Social Forestry Support Programme

SFSP Teaching Methodology Handbook

Learner Centred Teaching Methods
Instructional Supervision
Facilitation Skills for Rural Development

Handouts, Skill Cards and Forms

A collaborative document prepared for SFSP by Dr. Rudolf Batliner
using the Skill Card system developed by Dr. John Collum, Swisscontact

AGRICULTURE PUBLISHING HOUSE

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Acknowledgment

The preparation of this "SFSP Methodology Handbook" was requested and promoted by the Management of SFSP. That shows interest and commitment from the top of SFSP for what happens in the classrooms and in the field. It has been a privilege to cooperate with a program that puts "brain-ware" above hardware. Congratulations!

Whatever we have done in SFSP in the area of teaching and learning methodology has greatly benefited from concepts, instruments and the whole Skill Cards system, which have been developed by Swisscontact, the Training Institute for Technical Instruction (TITI) in Nepal under the pedagogical guidance of Dr. John Collum.

The Skill Cards of Section B2 have been translated by SVTC (Strengthening of Vocational Training Centers in Vietnam), an SDC / MOLISA project implemented by Swisscontact.

The Skill Cards of section D2 have been translated by SFSP Technical Assistants.

Thanks to all for allowing us to use your materials.

All my work has been based on a hand full of beliefs about teaching and teachers:

Professional responsibility	It is the professional responsibility of each teacher to deliver quality education - both in academic and methodological aspects.
Methodological freedom	Teaching is an art. It needs a "protected classroom space", in which the teacher is allowed to create "his/her" teaching/ learning process.
Continuous growth	Improving the quality of teaching is a never ending and exciting search for doing things better. It can become a source of great satisfaction.
Team effort	Growth is an individual challenge, more easily met if supported by colleagues with the same aim of improving teaching quality.
Practical applicability	The main concern of most university teachers is their subject. Concerning methodology, they prefer things that are simple and plausible - and that work.

Most of the SFSP teaching staff has responded very positively to my expectations and trust in their capabilities. Many of the materials shown in this handbook were adapted according to their feedback and performance. In each training session we shared happy moments of fun and joy. With some of you I had many opportunities to cooperate, with others unfortunately only few. Thanks to all of you for your contributions and your friendship.

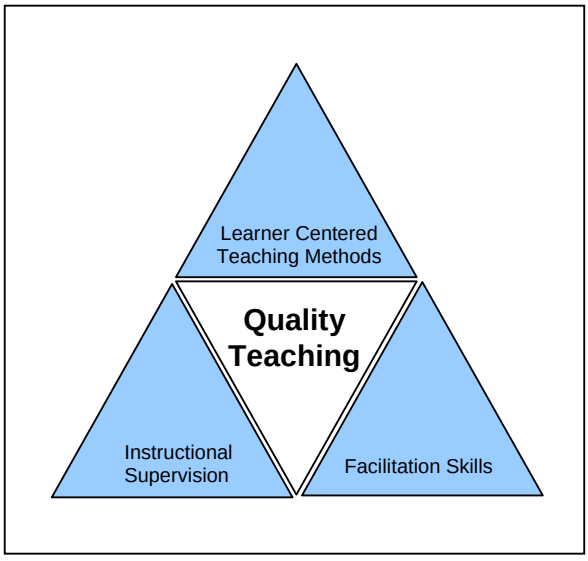
Learner Centered Teaching Methods work!

JUST DO IT.

Dr. Rudolf Batliner
Vaduz, April 2002

Introduction: Purpose and Structure of the Handbook

Why did you get this handbook? Because you are a teacher and you participated in at least one training session facilitated by SFSP and implemented by Dr. Rudolf Batliner. In this ***SFSP Teaching Methodology Handbook***, you will find all relevant materials that have been used in one or several training courses on Learner Centered Teaching, Instructional Supervision and Facilitation Skills for Rural Development. The handbook is a gift for you, and hopefully you will pass it on to your learners in the form of well prepared lessons in which your students are active and learn a lot.



What is the purpose of teaching and of any educational institution? Learning. Universities and lecturers are paid to help young people to learn, and to become competent professionals as well as useful members of the society. Quality teaching creates the conditions for an efficient and effective learning process.

Learning is change and challenge. When we learn, we add something to our vision of the world. We might also have to adapt this vision according to the new information. Learning is like constructing, deconstructing and reconstructing our inner world of knowledge, attitudes and values, and finally learning is a change of the visible behaviors. Therefore, a meaningful teaching process gives the learners plenty of challenging opportunities to actively deal with the content individually, as well as in discussion with peer students and the teacher.

What will the graduates of the forestry faculties - specializing in “Social Forestry" - do? Regardless of their exact future jobs, the forestry sector will need personnel that is not only technically competent, but is also able to deal with problems at village level and shows a high degree of empathy, the ability to listen and feel with others. Participation is a key word; creating horizontal communication with people of different social levels is a key competence. We can be sure that most of them will have to facilitate meetings, to present information, to help solving problems and to coach individuals and groups.

Education at university can be the perfect opportunity to learn, practice and gradually internalize a participatory working style, provided the teachers serve as role models.

SFSP has been investing a lot of effort and resources in helping teachers to become such participatory role models in classroom situations and during fieldwork. SFSP is convinced that the teachers are the key factor for quality teaching and learning. Enthusiastic teachers, who are competent in their technical specialization as well as in teaching methodology, make the difference.

In this handbook we try to offer you training materials in a systematic way. Except Section A, all sections contain at least two out of the following three formats: handouts, Skill Cards and forms.

The four sections of this handbook are:

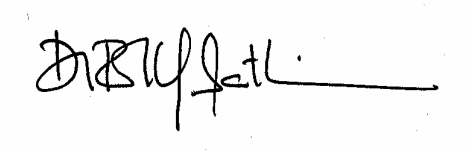
Section A:	Introduction

Section B:	Learner Centered Teaching Methods B1 Handouts B2 Skill Cards B3 Forms

Section C:	Instructional Supervision C1 Handouts C2 Forms

Section D:	Facilitation Skills for Rural Development D1 Handouts D2 Skill Cards

The SFSP Teaching Methodology Handbook is a special gift for special people. Hopefully you are kind enough to pass it on to your students. Do got give them the book, but deliver well prepared lessons in which your students are active and enjoy learning.



Vaduz, Liechtenstein, December 2001

Section B:
Learner Centered Teaching Methods

What are Learner Centered Teaching Methods - LCTM?

By Learner Centered Teaching Methods (LCTM), we understand all kind of teaching strategies that give the students the opportunity to actively involve themselves in the teaching learning process. The teacher remains an important source of information, but additionally he or she becomes a facilitator of the learning process of the students. The lessons are mainly used for processing the key knowledge and for practicing high level thinking skills like argumentation, application, problem solving, creativity and decision-making. "Ordinary" knowledge like simple facts, the students is expected to acquire themselves from the workbook, handouts and other sources of information like the library or the Internet.

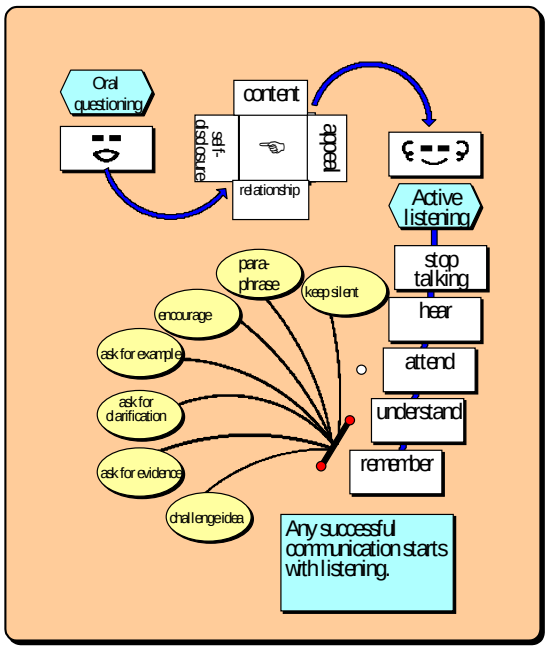
What do students typically see, hear, do and feel?

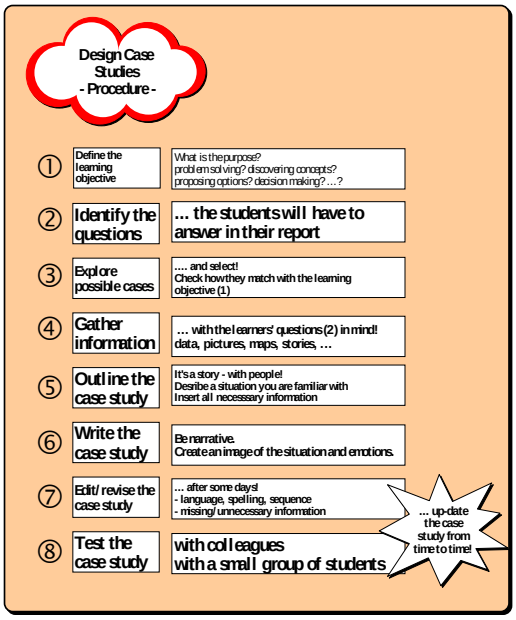
- Teachers talk less than 75 percent of the time.
- Students feel respect and appreciation for their contributions.
- Students work alone and in groups on challenging assignments.
- The classroom is a place of exchange of experience and in-depth discussion.
- Teachers give short, well-illustrated inputs.
- Students feel responsible for their learning and own progress.

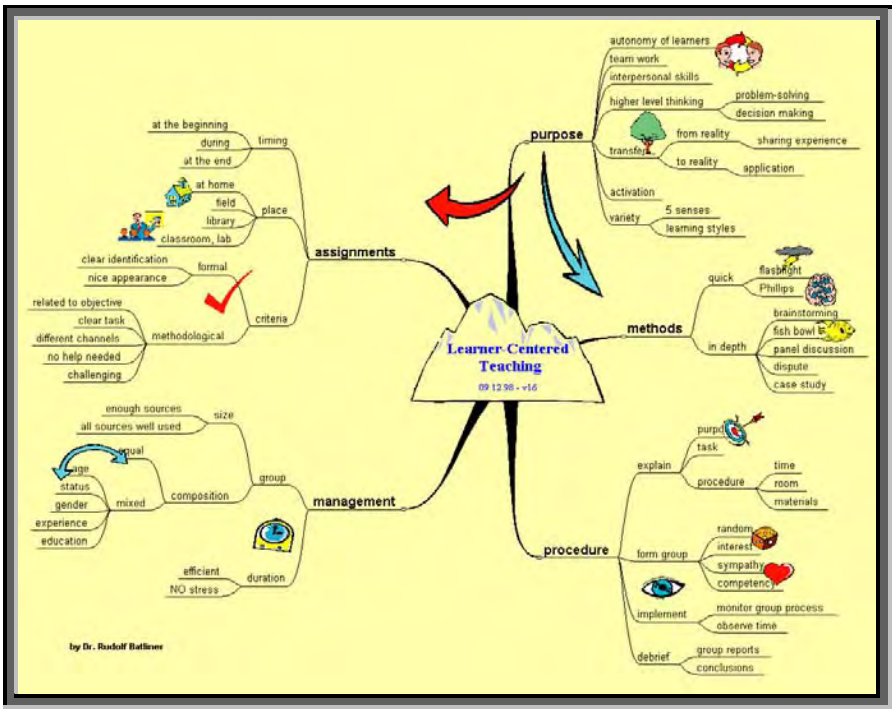
What is important?

The use of LCTM is not a question of resources. The success depends on a careful preparation of the lesson; trust in the capabilities of the students and a clear but respectful leadership. The key competencies of a teacher who applies LCTM are stimulating oral questioning, clear and relevant assignments and thoughtful debriefing.

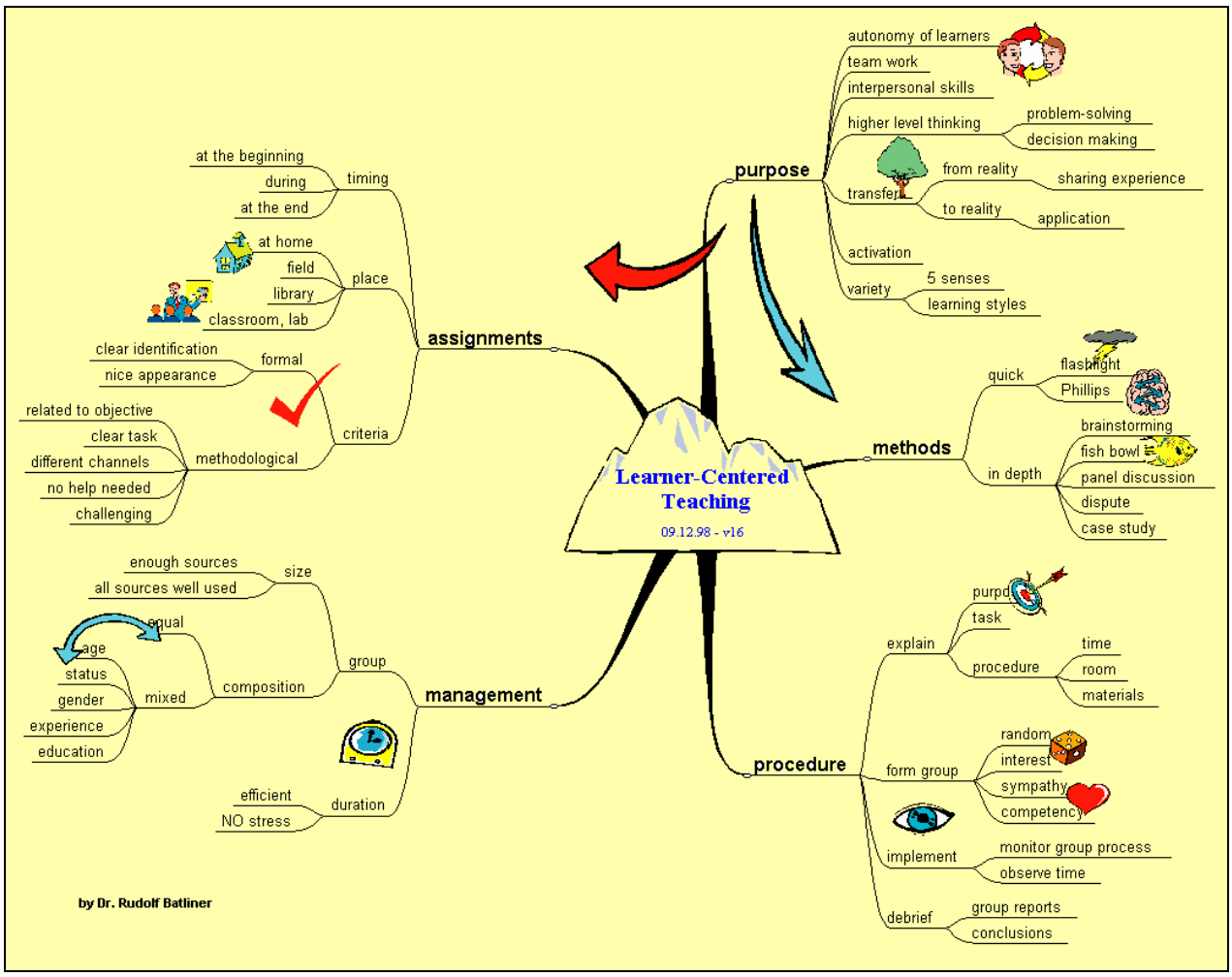
B 1 Handouts


Oral questioning
content
self-disclosure
appeal
relationship
Active listening
stop talking
hear
attend
understand
remember
para-phrase
keep silent
encourage
ask for example
ask for clarification
ask for evidence
challenge idea
Any successful communication starts with listening.


Design Case Studies
- Procedure -
① Define the learning objective
What is the purpose? problem solving? discovering concepts? proposing options? decision making? ...?
② Identify the questions
... the students will have to answer in their report
③ Explore possible cases
.... and select! Check how they match with the learning objective (1)
④ Gather information
... with the learners' questions (2) in mind! data, pictures, maps, stories, ...
⑤ Outline the case study
It's a story - with people! Desribe a situation you are familiar with Insert all necessary information
⑥ Write the case study
Be narrative. Create an image of the situation and emotions.
⑦ Edit/ revise the case study
... after some days! - language, spelling, sequence - missing/ unnecessary information
... up-date the case study from time to time!
⑧ Test the case study
with colleagues with a small group of students

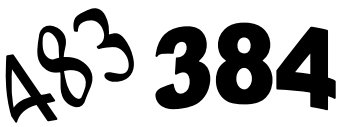

Learner-Centered Teaching
09 12 98 - v16
by Dr. Rudolf Ballreer
purpose
autonomy of learners
team work
interpersonal skills
higher level thinking
problem-solving
decision making
transfer
from reality
sharing experience
to reality
application
activation
variety
5 senses
learning styles
methods
quick
flashlight
Phillips
in depth
brainstorming
fish bowl
panel discussion
dispute
case study
assignments
timing
at the beginning
during
at the end
place
at home
field
library
classroom, lab
criteria
formal
clear identification
nice appearance
methodological
related to objective
clear task
different channels
no help needed
challenging
management
group
size
enough sources
all sources well used
composition
equal
mixed
age
status
gender
experience
education
duration
efficient
NO stress
procedure
explain
purpose
task
procedure
time
room
materials
form group
random
interest
sympathy
competency
implement
monitor group process
observe time
debrief
group reports
conclusions

Learner Centered Teaching Methods - Overview



Mini- Methods

Philips xyz



This method was invented by a man named Phillips. "X" stands for the group size, "Y" for the time and "Z" for the number of ideas to be presented. This defines the XYZ, considering the question to discuss and the number of participants. It could determine for instance a "Phillips 362" or a "Phillips 483".

Purpose

- activate learners
- tap experience
- share knowledge and experience
- create cooperative atmosphere
- become aware of prevailing ideas
- screen ideas

Procedure

1. Explain the method and the code.
2. Form the groups according to the first number of the code.
3. Ask the question to be discussed.
4. Allow discussion and observe time.
5. Ask one group after the other to report.
6. You may record the statements.

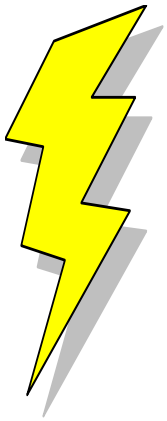
Rule of the game

Be quick, be productive, do not discuss in depth!

Hints

- Keep the group size rather low, the time short and the contributions limited. A "Phillips 11409" would be neither understandable, quick or activating.
- All groups can work on the same question, or they might receive different questions.
- Cards are very suitable to record, and afterwards group the contributions.

Mini-Methods



Flashlight

In a flashlight we allow the participants to express their feelings or opinions in a short statement. As the name indicates, the flashlight is a high-speed activity.

Purpose

- activate people
- give chance to express feelings
- make opinions transparent

Procedure

1. Explain the rule of the game.
2. State the question.
3. Ask for statements.
4. Make sure that everybody observes the rules.

Note: usually we do not record the statements !!!

Rules of the game

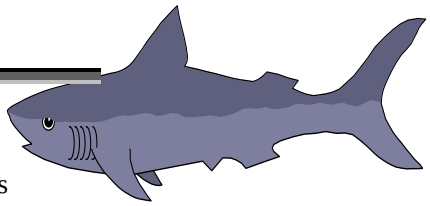
Short statements. No discussion! Not even the teacher comments on the statements.

Hints

1. According to the situation you can ask (or even force!) everybody to give a , or ask for volunteers.

Mini-Methods

FISH-BOWL



As the name "Fish bowl" indicates we have an inner group that acts and is surrounded by a groups of observers. So in large group the number of possible participants is reduced. In the bowl the fishes can discuss and give contribution to a maximum.

Purpose

- discuss a topic in-depth
- perform role-plays
- observe behavior in a group

Procedure

1. Explain the topic, the purpose and the procedure.
2. Ask participants to come into the bowl.
3. Ask one "fish" to moderate the bowl (or do it yourself).
4. The moderator states the topic and starts the discussion.
5. If observers are appointed, explain to them their tasks.
6. At the end thank the fishes and the observers for their participation.
7. Debrief the fish bowl, starting with the facts the observers have listed.

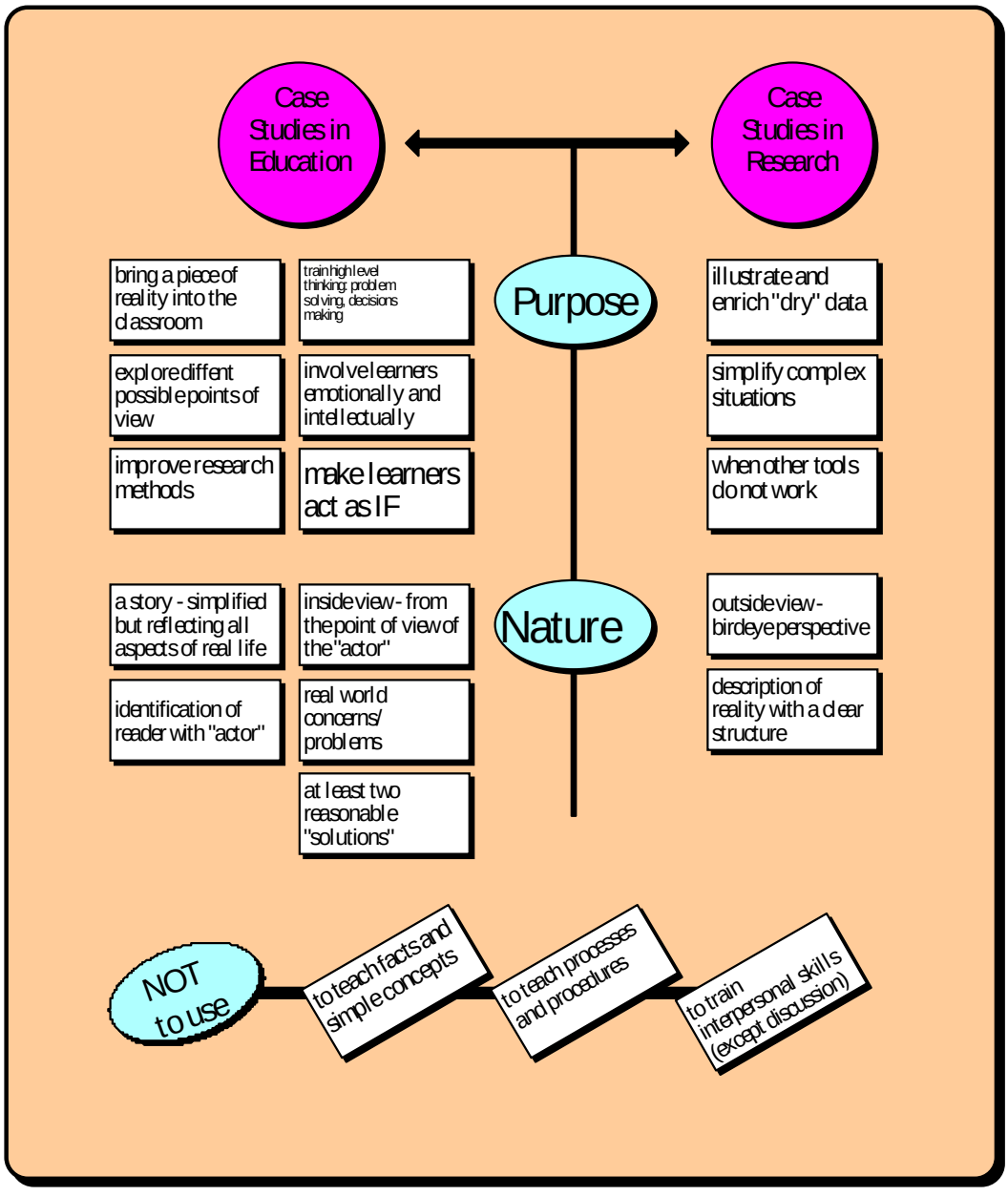
Rules of the game:

Clear objective, well defined roles, strong leadership in the fish bowl.

Hints:

- To increase participation you can place an extra chair in the bowl. So the people outside the bowl become "frogs" who can jump into the water in order to contribute. Afterwards they go back to their seat.

Case Studies in Education and Research



Learner's Guidelines for Case Study Analysis

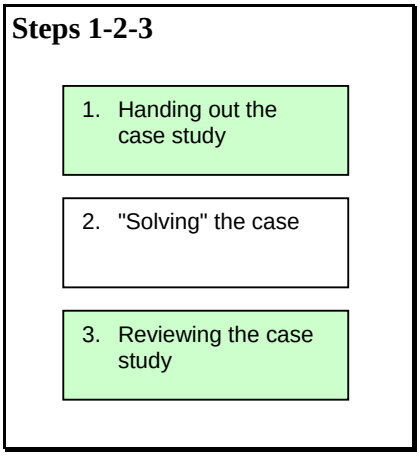
Most simply, case studies are stories - real or simulated - that illustrate important features of a field of study. A case study may include a case history - a description of how the situation or the problem evolved. What is essential is that we address real-world concerns by using the knowledge that we have gained about forestry and extension.

In approaching cases, you should keep the following issues in mind:

What questions must be answered? What problem must be solved? What specific situation must be addressed?

Based on your interpretation of the situation or problem, what solution(s) could be proposed?

Case Study Analysis Procedure



1. A description of each case, including pertinent questions will be handed out in class.
2. Outside class, you will answer a series of questions about each case.
   You are free to work together. Information provided in class or found in the textbook should be sufficient to answer the questions. However, you may use any other source of information that may be appropriate, (e.g. library, resource persons)
   You must hand in your written answers to the case study questions on or before the day of the case study review.
3. On the class day of case study review, you may be quizzed on your analysis of the case. The case study will be reviewed in class.

Suggestions for Successfully Answering the Case Study Questions

- To answer the case study questions correctly, you must read them carefully and consider exactly what is asked for. The importance of knowing exactly what a question is asking cannot be over-stressed. Ask a teacher if you are unsure.
  - "Name ..." requires the name of something.
  - "List ..." requires a list of all relevant items requested.
  - "Prioritize ..." requires a ranking of items according to certain criteria.
  - "Explain ..." requires you to give an explanation in your own words (not a copy of the text).
  - "What is ...." requires you to identify or define the item(s)

- "How ..." requires you to describe a process, a mechanism, a series of cause and effect events whereby something occurs.
- "Propose ..." requires you to present a logical, coherent series of steps/actions that would solve the problem presented.

- Do not simply copy long sections of information from the text or another document. You must ANSWER the question, not merely find the facts.
- If you quote or paraphrase a document you must give a reference. Similarly you must make reference to lecture notes.
- Brevity will be rewarded. Remember: What we really understand, we can express in a few words.

Evaluate Case Studies

When learners present their solution of the case study, they deserve a detailed discussion and feedback from either the teacher alone or the colleagues and the teacher. When you evaluate the solution, be aware that in good case studies there does not exist a single best solution. There is MORE THAN ONE good solution. Therefore, be open-minded, be critical and be self-critical.

The evaluation of the case study has to be based on clear criteria. In addition, the learners should know them before.

First come the criteria regarding the content:

"Must" criteria		
Relevancy	Does the solution address the real problem(s)?	Problem analysis
Feasibility	Can the solution be implemented in terms of resources (time, money, people)? Is the solution legally viable?	Analysis of resources
Effectiveness	Will the proposed solution solve or at least help to solve the problem?	Analysis of benefits and risk assessment
Efficiency	Will the result be achieved with a reasonable amount of resources	
"May"-criteria		
Innovation	Does the proposal suggest new solutions or just go along with the standard procedures?	
.....	.....	

When the learners present the result of the case study in the form of a written document, the following formal criteria might be applied additionally:

Structure: Description of the problem, problem analysis, alternative solutions, selection criteria, proposed solution

Language: Wording, grammar, spelling, ...

Appearance: Writing, lay-out, illustrations, neatness

How to Successfully Discourage Classroom Discussion[1]

Many teachers unwittingly behave in ways which not only frustrate their own goals, but also actively discourage significant (as opposed to rote) student learning. The relationship between certain behaviors of teachers as perceived by their students and the quality and quantity of student's learning, motivation, and student-teacher communication is amply documented in the research literature. At issue is the relationship between intent and actions: What teachers do and how they do it has more impact than what they say. In this paper six common non-facilitating teacher-behaviors are presented:

1. The insufficient "wait-time"
2. The rapid-reward
3. The programmed answer
4. The non-specific feedback questions
5. The teacher ego-stroking
6. The low-level questioning

The Insufficient "Wait-Time"

"Wait-Time" is the amount of time after the initial question has been posed before the teacher answers it himself; repeats, rephrases, or adds further information to the question; or accepts an answer from a student.

More than just a few seconds are necessary for mental information processing. When the teacher is filling in every possible silence with his voice, what chance do students have either to think over what has been said, formulate intelligent responses, or ask for clarification? Students who note that the teacher answers most of the questions himself without waiting for responses, soon grow depend upon the teacher to do the thinking for them. We may express verbally our aim of encouraging independent thinkers, but unless we consciously work to expand our wait-time, we will have rhetoric with little change in behavior.

Rowe (1974) reported that when teachers were trained to increase their waiting time from one-second to 3-5 seconds, several changes occurred in students' behavior:

- length and number of unsolicited but appropriate responses increased
- failures to respond decreased
- the incident of student-to-student comparisons of data increased.

[1] This text has been adapted from: Napell, Sondra M. - Six common non-facilitating teaching behaviors. In: Barnes, Louis B. et al. - Teaching and the case method. Text, cases and readings. Harvard Business School Press, 1994, 3rd edition. P. 199- 202

A simple way of increasing "wait-time" after posing a question is counting ("one, one-thousand, two, two-thousand, three .....). Sharing the concept of "wait-time" with the students often increases the effect and gives the students an insight into learning skills.

The Rapid-Reward

What is the effect on students' thinking process when a teacher says to the first respondent to his question: "Right, good!" ..... and goes to the next topic? Learning is a highly individual-istic process, and people learn at different rates and varying ways. Rapid acceptance favors the fast (thinkers) speakers and terminates prematurely the thinking process of the others.

A variation on this theme is the softly voiced, hesitant answer of a student seated near the teacher. Many students seated out of the earshot are frustrated and loose interest when a soft voiced, difficult to hear answer is rapidly rewarded. To improve this situation, encourage discussion, student-to-student dialogue, and peer critique of each other's ideas. How can you do that? Some suggestions are:

- extend silent time after an answer was given
- glance around at other students tacitly requesting comment
- ask the students in the back: "What is your analysis of what was just said?"
- from time to time, move around the room to be near to all students.

The Programmed Answer

The following examples might exemplify this non-facilitating teaching behavior:

> *"What are some enemies of the preying mantis? Cats kill them, don't they? How about other animals? Or insects?"*
>
> *"What happens when we add the sums of the rows? Do we get skewed results?"*
>
> *"Look at this shrub and tell me, what observations you can make. Do you see dead stems? Are they damaged from insect feedings?"*

The programmed answer deprives the students of expressing their own thoughts by manipulating them towards the answer the teacher expects. It also conveys the message that there is little interest in what the learners think or say.

Many teachers who show this behavior put forward altruistic reasons like: "Silence after asking a question is embarrassing to the students." or "I only help them out by suggesting clues." In reality, who feels uncomfortable - the students or the teacher? Maybe the teacher is lacking confidence in the students' ability to think and to formulate meaningful responses. "Programming" might be an effective tool when the teacher wants to guide the learners' thinking and to model logical thinking processes, but it decreases independent thinking and the variety of possible ideas.

The Non-specific Feedback Questions

"Are there any questions? Do you all understand?"

Many teachers assume that their students have no questions, if no one responds to such a question. Why do such questions fail to solicit questions? One answer might be found in the

nature of the students. What type of student will volunteer to (bravely) expose his own ignorance? Interestingly enough, the answer was given by a student who suggested that those who respond and ask a question comprehend most of the concept, lesson, problem, etc., and need only a minor point to be clarified. Others, whose confusion is great, may be too ashamed and intimidated to publicly admit their situation. Often they are so confused they cannot think of a question to ask. Yet, these ones most need our attention.

How can we find out what they do and what they do not understand?

- One way is to ask questions like:

  "Who wants me to go over this explanation again?"

  "This might have been a difficult concept to grasp the first time. Let's try to summarize together some definitions of what it means."

- Another way is that the teacher asks several specific questions about the topic himself:

  "What conclusions can we generalize from this graph?"

  "In which situations does this principle apply? Give me some examples out of your context."

The Teacher's Ego-Stroking and Classroom Climate

What is the effect on students' willingness to respond when the teacher makes statements such as the following?

> *"Since I have explained this several times already, you all should know, what is the effect of an increased demand upon this supply curve."*
>
> *"Obviously when you use this formula you'll get .....?"*
>
> *(After having listened to several students' answers) "The real answer is ..... ."*
>
> *"Okay. Now rephrase your answer the way you think I would say it."*

Students need to feel that it is psychologically "safe" to participate, to try out ideas, to be wrong as well as be right. The teacher's behavior is the most determining factor in establishing a safe and comfortable climate. Learning, an active process, requires that the learners interact with ideas and materials. Constant teacher-talk, commenting on each student idea, being the final arbiter in decision-making, interrupting, controlling, intimidating through expertise or through grades - these are some of the behaviors that prevent students from engaging themselves in the active learning process.

Behaviors that encourage participation are:

- The teacher remembers students' contributions and refers to them
- The teacher acknowledges his own fallibility, framing open-ended questions
- The teacher accepts the students' right to be wrong as well as to be right.
- The teacher encourages the joint determination of goals and procedures when feasible (*"How can I help you best to learn this material?"*)
- The teacher allows students to answer the questions of their peers.

The Low-level Questioning

The taxonomy of Bloom (1956) differentiates six levels of cognitive operations: Recall (of factual knowledge), comprehension, application, analysis, synthesis, and evaluation. Questioning is a central feature in promoting high-level thinking. Unfortunately, research shows that many teachers are fixated on the low level question, asking students mostly for the recall of information presented to them before.

> *"What is the definition of 'quantity demanded'?"*
>
> *"What is the formula for finding the force between two charges?"*

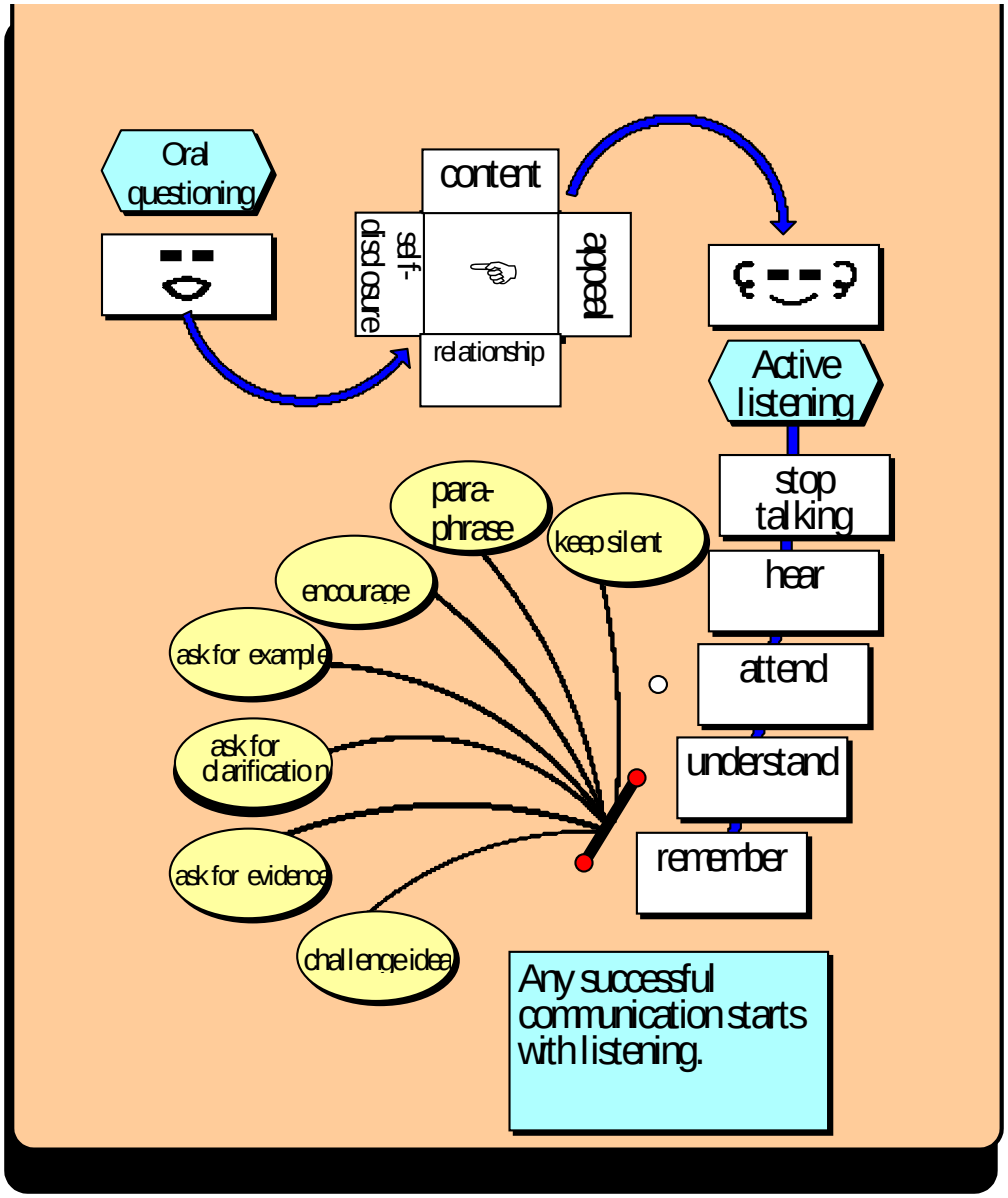
One-word or short-phrase answers, those capable of being sung out in unison, constitute the preponderance of question-answer dialogues in many classrooms. Facts are important, but fixing students at this level discourages the development of complex intellectual skills they will need on their job. Questions such as those listed below encourage the students to use informational knowledge in order to analyze concepts, synthesize complex relationships, and evaluate the new data:

> *"Describe some possible effect of a rent control law on the demand curve."*
>
> *"What would happen if we insert a metal conductor in between the moving charge and the current?"*
>
> *"Why must the information on table 1 change when we consider these new data?"*

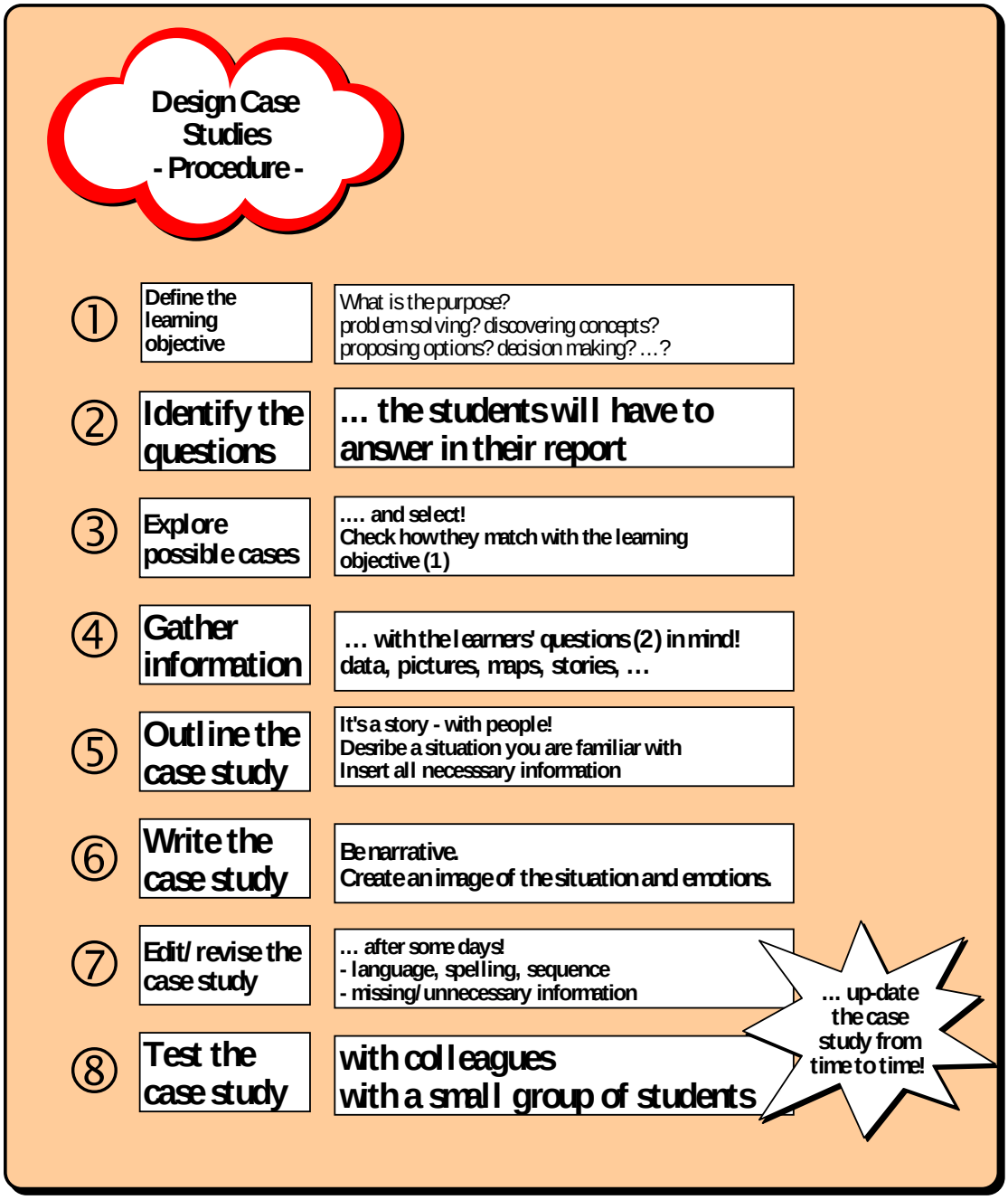
Being conscious of the level of questions and preparing high-level questions in advance can do a lot to stimulate independent thinking and meaningful participation in the classroom discussion.

Most teachers would say that they aim at the nourishment of intellectual curiosity, at the encouragement of independent learners and at the development of students' complex thinking processes. Yet, teachers behaviors such as the six described in this paper mitigate the achievement of these goals. Changing these behaviors starts with an honest assessment of the own teaching practice.

Active Listening in Oral Questioning

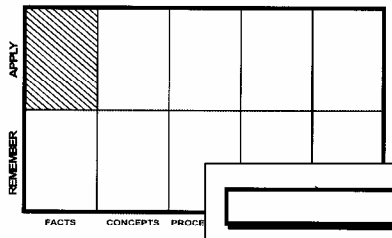


Design Case Studies



B2 Skill Cards

A Matrix for Learning



modified Content-Performance Matrix is shown in Figure 1.

The key to understanding the matrix is realizing that the two main ingredients of instruction are:

- The content
- The performance outcome

Merrill defines the *content* of any

Figure 1 – The Conter

Introduction

Educators have always thought that if we better understand learning, we can do a better job of teaching. For nearly 50 years, many experts have proposed different ways to structure knowledge (what we learn.) This Concept Card builds primarily on the work of Benjamin Bloom, Robert Gagne and David Merrill in providing a simple learning framework that teachers can use to design more effective instructional strategies. This Concept Card provides the foundation for the following five Skill Cards that follow:

Teach Facts
Teach Concepts
Teach Procedures
Teach Processes
Teach Principles

Bloom's Taxonomy

Beginning in the 1950's with the work of Benjamin Bloom, educators have developed many models (or taxonomies) to describe the domains of learning. Bloom's famous taxonomy grouped all learning into the following categories:

- Cognitive – intellectual
- Affective - attitudinal
- Psychomotor - physical

This achievement finally made it possible for teachers to more

Concept Card©

Design Case Studies

Introduction

A good case study is a tool by which a piece of reality is brought into the training session. Case studies are similar to problem solving activities but with one big difference--they can be more effective because they involve the learner in real world experiences.

Definition

A case study is a written document containing all relevant data about an actual situation or event. Cases are focused on a person, an incident or a situation.

Purposes

The primary purpose of a case study is to develop the learners ability to think, decide and choose appropriate courses of actions. Applied properly, case studies help to:

- Get learners involved in the lesson
- Improve problem solving skills
- Improve decision making skills
- Increase learners ability to synthesize facts
- Allow theories to be applied to real circumstances

Advantages

A case study allows learners to look at their reactions and responses to specific situations and compare them with those of others. Thus learners:

- gain awareness that the real world problems can be addressed through many possible solutions
- develop a sense of objectivity
- develop increased tolerance for different points of view
- build up confidence in using new skills, concepts and theories

Identify the problem of the case

In designing a case study, the instructor's objective is to help learners use concepts to analyze situations and make decisions. The instructor must first be clear about what learning is desired. Is the case study to be used to apply a concept or principle? The learning objective must be identified.

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Present Information with Transparencies

Introduction

People learn best when many senses are stimulated. Combining words with related pictures strongly increases the memory retention rate.

Well designed transparencies are an effective means for strengthening learning, provided the instructor is capable of using them properly in the classroom.

This Skill Card describes how to set up and use the overhead projector (OHP). There is a complimentary Skill Card on how to prepare transparencies.

Preparing the OHP

A proper set up of the OHP and the screen is a precondition for a successful presentation with transparencies.

The following steps show you how to set up the OHP:

1. Place the screen in the middle-front or front corner of the room.
2. Aim the screen at the center of the audience.
3. Place the OHP directly in front of the screen, 2-3 meters from screen.
4. Plug the OHP into the electrical supply (wall outlet).
5. Place the power cord to avoid a tripping hazard (tape to floor).
6. Place an example transparency, aligned carefully, in the center of the projection surface. Turn the OHP on.
7. Aim the projected image at the screen using the mirror and by moving the OHP. **Be careful**, turn off the OHP when you move it, and wait a few seconds, because the bulb might break!
8. Fill the screen with the projected image by moving the OPH either closer or further from the screen.
9. IF the screen can tilt, tilt it to align the image with the screen borders. Re-aim and re-focus.
10. Check the view to the screen from all parts of room.

Hints:

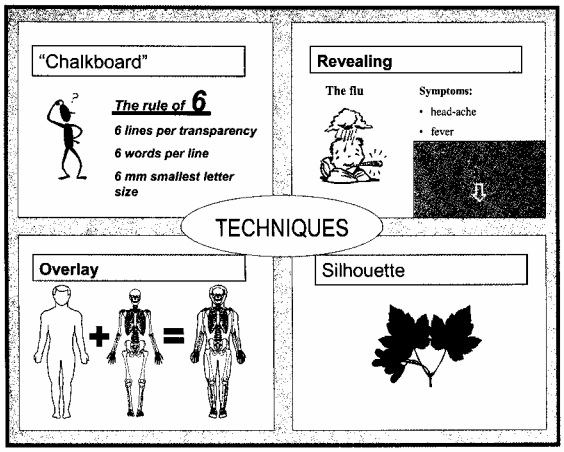
- Make sure that there is a spare bulb at hand.
- Often, you are at a place for the first time and somebody has already set up the OHP. Check to be sure that everything works, at the same time becoming familiar with the room.

Presenting Techniques

At the bottom of this page, we present four techniques for using the OHP.

Chalkboard

Draw and write on an empty transparency as if you were using the chalkboard.

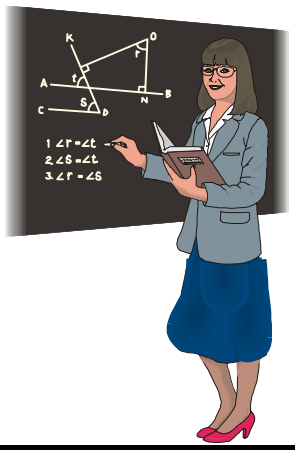


Skill Card©

swisscontact

Developed by Devi P. Dahal & Dr. Rudolf Batliner

Summary of Research on Effective Teaching



Introduction

In the past 80 years, over 200,000 research studies have been conducted on teaching, 1,000,000 articles have been written and 250,000 dissertations defended. Yet, most teachers would not be able to quote one specific bit of that research. According to B.O. Smith (1980) what we know about teaching comes from two different areas:

- research, and
- clinical experience.

Clinical experience is that large body of knowledge written by teachers about what works best for them. The majority of what is known about teaching comes from clinical experiences passed on from teacher to teacher. This does not mean that research should be ignored. Research often agrees with and supports clinical experiences. At times, research provides totally new insights into teaching. The professional teacher or instructor should continuously keep up to date with the literature from both research and clinical experience.

Extracting from hundreds of research studies provides us with the following information:

Planning

The research is clear. Teachers who invest time for planning have students who learn more. Studies indicate the following are important considerations:

- Utilize yearly, long-range, short-range, weekly, daily, and lesson plans
- Utilize reflective planning
- Identify and use objectives

Physical environment

A pleasant physical environment makes the task of teaching and learning more enjoyable. Studies indicate the following are important considerations:

Furnishings arranged to:

- optimize instructional opportunities by facilitating movement;
- minimize crowding;
- provide an appropriate visual focus;
- Facilitate the retrieval of materials.

Teacher

Repeatedly, studies point to the single most important characteristic of a good teacher:

Enthusiasm!

Delivery

Research favors the creative teacher who is constantly challenging and even surprising the students. Studies indicate the following are important considerations:

- Providing frequent reviews
- Stating the lesson objectives
- Use of explicit teaching models (Rosenshine, Hunter)
  1. Review
  2. Preview (including objectives and advanced organizers)
  3. Presentation
  4. Guided practice
  5. Correction and developmental feedback
  6. Independent practice
  7. Weekly and monthly reviews
- Use of a wide variety of methods
- Visualizing information
- An indirect teaching style
- Use of advanced organizers
- "Hooking" new information onto old
- Frequent testing
- Use of homework
- Use of student experiences
- Use of cooperative learning strategies
- The frequency and quality of teacher-student and student-student interactions
- Use of a task-oriented, business like approach to instruction
- Giving out highly detailed study notes

Questioning

Many studies show that the number and variety of questions asked by the teacher is directly related to student achievement. Studies indicate the following are important considerations:

- Use of frequent questioning
- Use of open questions
- Use of questions at different cognitive levels
- Allowing increased wait time after asking questions (3+ seconds)
- Varying the difficulty level of questions for different students
- Stressing students understanding of the meaning of questions
- Asking process questions (How did you arrive at that answer?)
- Explaining why a response is incorrect

Motivation

There is no magic formula to motivation. A student may be highly motivated in one class and not in the next. The primary difference seems to be in the environment created by the instructor. Studies indicate the following are important considerations:

- Consistent rules
- High expectations
- Discussion activities (indirect learning)

- Praise
- A variety of teaching methods
- An atmosphere of involvement and success
- An environment of teachers and students working together
- Explaining the relevance of the lesson
- Maintaining a brisk instructional pace
- Unpredictable questioning patterns
- Avoidance of harsh criticism
- Equitable treatment for all

Feedback

All students need feedback as a vital part of the learning process. The feedback may be simple and informal or of a more formal nature (tests.) Studies indicate the following are important considerations:

- Regular oral formative feedback
- Extensive use of praise, but, only real recognition for real achievement
- Immediate and high frequency feedback
- Constructive versus destructive feedback

Evaluation

Evaluations should be both formative and summative in nature. Frequent evaluations are more effective that one or two evaluations per term. Studies indicate the following are important considerations:

- Students understand the evaluation system
- Specific statements of objectives, in measurable terms are communicated to students
- Frequent evaluations (weekly)
- Low and higher level objectives provided
- Formative evaluation used to evaluate instructional effectiveness
- Mastery learning approaches used

Time-on-task

It is no surprise that the more time spent on instructional related activities during a class, the greater the achievement. Yet numerous studies have shown that in many classes, only 15 -25% of the time is spent on actual teaching-learning activities. Studies indicate the following are important considerations:

- Classes begin promptly
- Administrative and managerial tasks minimized
- Clear and detailed instructions are pre provided for learning activities
- Use routine procedures for paper flow

Management

Classroom management: Those procedures and provisions necessary to establish and maintain an environment in which instruction and learning can occur. Classroom management is not the same as teaching; however, it is a precondition for teaching. Studies indicate the following are important considerations:

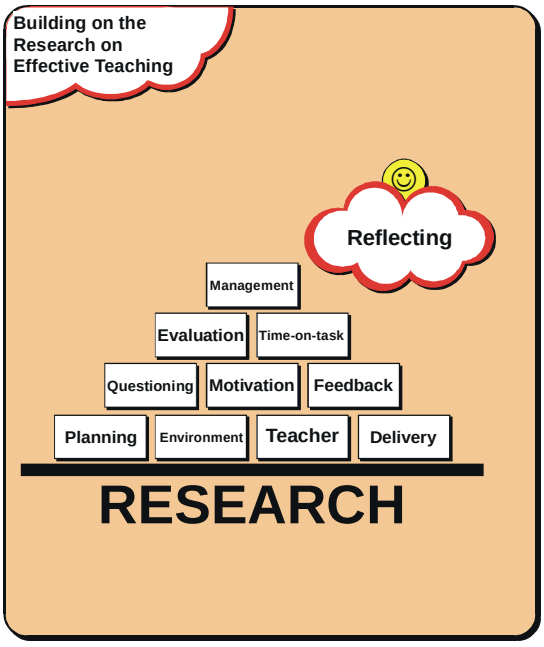
- Simple administrative procedures (taking roll, taking in papers, handing out papers)
- Minimize interruptions
- Organize physical space
- Organize instructional materials
- Clear, simple rules
- Rules systematically taught
- Rules monitored and enforced
- Control behaviour with minimal disruptions (low profile)
- Positive feedback used for appropriate behaviour
- Teacher models desirable behaviour

Reflecting

Excellent teachers plan time at the end of every lesson to think back over "what happened." Such reflection allows the teacher to note what worked and what did not. Make notes on the lesson plans that will improve the lesson next time.

Conclusion

Keeping up to date with the research on effective teaching and putting the research into practice is a lifelong job for every teacher.



Use Basic Platform Skills

Introduction

"The ability to express an idea is nearly as important as the idea itself".

Bernard Baruch

The impact of a speech is strongly affected by how the speech is delivered. If you want your audience to be enthusiastic about the ideas you present, you must be enthusiastic yourself!

Purpose

Effective platform skills help:

- build credibility into everything we communicate
- establish rapport with the audience
- deal with nervousness during a presentation
- make consistent the three elements of speaking (verbal, vocal & visual).

Effective Communication

A. Mehrabian conducted a research on the following elements of speaking:

1. **Verbal** - the words.
2. **Vocal** - the intonation, projection and resonance of voice.
3. **Visual** - basically the face and the body.

He found that the degree of consistency between these three elements was the primary factor that determines the believability of a presentation. In consistent messages, the content of the message, the enthusiasm of the voice, the animation of the face and body, reflect the confidence and conviction of what is said.

When we are nervous or under pressure, we tend to block our content and give a very inconsistent message. For example, someone who looks downward, speaks in a halting voice and says, "I am excited to be here"; is giving an inconsistent message. His/her words will not be believed.

Key Elements

Vocal delivery and the visual elements as well as the personality and openness of the speaker are the main ingredients of good interpersonal communications. The factors that make your presentation animated, interesting and engaging are:

1. Voice
2. Body language
3. Controlling nervousness.

Voice

The speaker's voice should have the following characteristics:

- **Volume**: Clear and audible, even at the rear of the room. .
- **Pitch**: Pitch is the high or low tone of the voice. Inflections should be used for interest. Avoid a monotone pitch.
- **Rate**: Rate is the speed at which a person speaks. Speak about 125 words per minute. Slow down for good effect at important points.
- **Pauses**: Pauses give added weight to the preceding words. Use pauses at the end of an idea and at the end of a paragraph (normally 1-2 seconds).
- **Pronunciation**: Use correct pronunciation. Practice difficult words before the presentation.
- **Filler words**: Avoid or reduce filler words like 'I mean', 'yeah', 'okay', 'you know.' Also avoid using vocalized pauses (filler words) such as pauses with 'uh', 'er', 'un', etc.

Body language

(Non-verbal Language)

Not only is what you are saying important, but also how you are saying it. Your presentation should be animated, interesting and engaging. Your body language should be consistent with your voice.

- **Personal appearance**: Listeners always see you before they hear you, so your dress should be appropriate to the audience and not distracting.
- **Attitude**: Be your natural self. Use natural styles.
- **Posture**: Keep your posture erect and relaxed.
- **Body movement**: Use smooth and natural motions, not fast and jumpy.
- **Gestures**: What do you do with your hands, while delivering the presentation? Hand gestures should appear natural and spontaneous and not robotic.
- **Facial expressions**: The expressions on your face should be enthusiastic and confident.
- **Eye contact**: Eye contact helps to establish and build rapport. Use uniform eye contact for 1-3 seconds per person for a reinforcing effect. Slowly scan the audience, section by section.

Controlling nervousness

Nervousness is the result of a desire to do well. Being nervous is quite normal. However, the following 'TIPS' can help to reduce or deal with nervousness.

- Be prepared. Organize the presentation.
- Create a vision. Before entering the classroom conduct an imaginary presentation. In your vision, imagine you have just given an excellent presentation that was well received by your audience.
- Take a couple of deep breaths before standing up to speak.
- Make the 'Introduction' the best you can. A strong first 3 minutes can help a lot to reduce nervousness. Write out your first few sentences.
- Think positively. Assume that the people in the audience are your friends.
- Focus on relaxing--try meditating before a speech.
- Use visual aids, if possible. Always have one chart posted that you can quickly glance at, that shows your outline or key points.
- Begin with a question that requires the audience to respond—this gives you a moment to relax and puts you in control.

Conclusion

Achieving excellence in interpersonal communication is a complex process made up of several basic skills. A message will be believed if the verbal, vocal, and visual elements of the communication are consistent. A lively and expressive voice reinforced by a relaxed and natural body language can help the speaker deliver a message that will be believed. Finally, always remember the words of John Molloy:

Performance Guide

Use Basic Platform Skills

1: Needs Improvement; 3: Acceptable; 5: Excellent

Voice		**1**	**2**	**3**	**4**	**5**
Volume	- Clear and audible.					
Pitch	- Inflection timely.					
Rate	- Average (125 wpm).					
Pauses	- Appropriate.					
Pronunciation	- Correct.					
Filler words	- Minimum.					
Non-verbal Language		**1**	**2**	**3**	**4**	**5**
Posture	- Erect and relaxed.					
Personal appearance	- Clean and appropriate.					
Gestures	- Natural.					
Eye contact	- Uniform.					
Facial expressions	- Confident, relaxed.					
Movement	- Slow and timely.					
Nervousness Control		**1**	**2**	**3**	**4**	**5**
Appeared relaxed.						
Strong introduction.						
Well organised.						
Visuals used.						

Total Score _____ out of **15**

You never get a second chance to make a good first impression!

Principles of Cognitivism

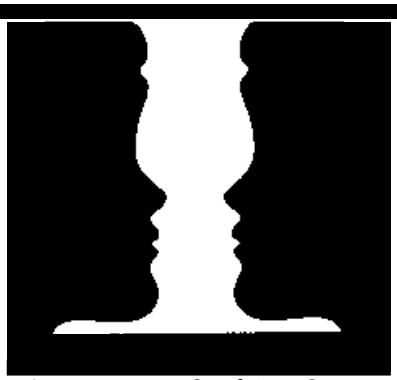


Figure 1 Example of Gestalt Principle, figure-ground

Introduction

During the last two decades cognitive psychology (**cognitivism**) was the predominant perspective in research on learning. Cognitive psychologists examine how individuals process information internally (mentally). Processes like attention, perception, memorizing, thinking, problem solving, motivation, and creativity are the center of focus. In contrast to behaviorists, who emphasize the roles of environmental conditions (stimuli) and overt behaviors (responses) in learning, cognitivists study mental processes that are not directly observable.

Purpose

Many assumptions underlying cognitivsm are radically different from behaviorism. Because people possess abilities that are unique to the human race (e.g. language, consciousness) learning in humans is regarded as different from learning in animals. Learning involves an internal, mental change, but not necessarily the external behavior change that behaviorists propose. Cognitive processes (thoughts, beliefs) mediate the relationship between stimulus and response. Learning is a process of relating new information to previously learned information.

Cognitive Theories

1. Gestalt psychology

In the early 1920's German psychologists like Wertheimer, Koehler and Kofka started to explore human perception. **Wertheimer** observed that when two lights blink on and off sequentially at a particular rate they often appear to be only one light moving quickly back and forth. The fact that an individual "sees" motion when observing stationary objects led Wertheimer to the conclusion that **perception may be different from reality**. He assumed from this and other experiments, that the organism structures and organizes experience. For example, in Figure 1 you can see a vase or two faces depending on the mental organization of the perception. Existing cognitive structures (memories of past experiences) influence the manner in which information is perceived and interpreted. Learned perceptions create templates (expectations) through which a learner filters new information. These templates set up constraints that either facilitate or interfere with the learning process. In this theory **the learner is regarded as actively participating in the learning process with a personal history of learning that is important for future learning**.

2. Piaget's develop mental theory

The Swiss biologist Jean Piaget (1896 - 1980) is regarded as one of the most influential researchers in the field of cognitive psychology. Although Piaget's theory dates from the 1920s many of his ideas can be found in contemporary cognitive theories of learning.

- According to Piaget our knowledge is structured and organized. He uses the term **schema** (plural **schemata**). A schema is a schematic representation of organized knowledge. In another definition, a schema is described as a mental unit that represents a class of similar actions or thoughts. For example, an infant might have a schema for grasping and use it for grabbing everything from bottles to rubber ducks.
- For learning to occur, an individual must be able to **assimilate** (integrate) new information into existing cognitive structures or to **accommodate** (modify) existing cognitive structures. For example, a penguin doesn't look like a bird at first sight. But taking the criteria for an animal being a bird into consideration (e.g. laying eggs) you start do see the penguin as a bird (assimilation). On the other hand if you thought that metal couldn't float on water you have to change your mind after having seen an iron ship on a lake (accommodation).
- Cognitive development from childhood to adulthood progresses through distinct stages. The thought processes at each stage are qualitatively different from those at other stages. Each stage provides the foundation for the next step. A commonly used example to illustrate this finding is *the conservation of liquid problem* (see Figure 2).

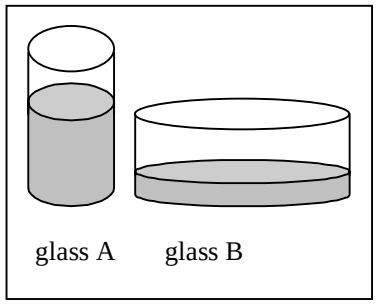


Figure 2 The conservation of liquid problem

Imagine two glasses: Glass A is thin and tall and filled with water. If you pour the content of glass A into an empty glass B which is short and fat the water level will be lower in glass B. A five year old will tell you that in glass B there is now less liquid than originally in glass A. The child's thinking at this age is more ruled by perception than logical thinking: the water levels in the glasses are different so the content must be different.

3. Constructivism

Researchers like Heinz von Foerster, Ernst von Glasersfeld, or Paul Watzlawick state that learners con-

struct their own reality. By reflecting on their experiences, people construct their own understanding of the world they live in. Each individual generates his/her own rules and mental models, which he/she uses to make sense of his/her experiences. There are several guiding principles of constructivism:

- Learning is a search for meaning.
- Meaning requires understanding wholes as well as parts; and parts must be understood in the context of wholes.
- The purpose of learning is for an individual to construct his or her own meaning, not just to memorize the "right" answers.
- To truly understand material, **learners must rediscover for themselves the basic principles**.

4. Bruner's theory of discovery learning

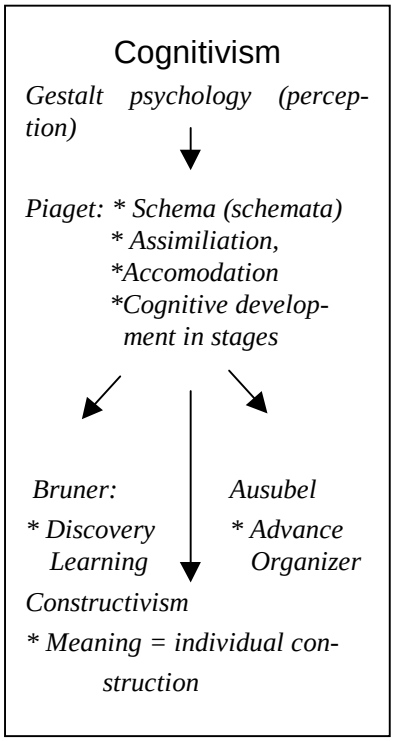
Jerome Bruner, an American psychologist, is known for his ideas about discovery learning. Learning becomes more meaningful when learners explore their learning environment rather than listen passively to instructors. Discovery learning involves formulating and testing hypotheses instead of simply reading or listening to instructor presentations. Learners move from studying specific examples to formulating general rules, concepts and principles (**inductive learning**). To make discovery learning effective the instructor has to plan and organize the learning opportunities for his/her learners to discovery to happen.

Without that guidance it would take a learner a very long time to discover the things the instructor wants to teach to his/her learners. For example, a biology instructor might use guided discovery to help trainees to learn animal groups such as mammals, birds, and reptiles. Rather than providing the basic animal groups with names and examples, the instructor can ask learners to provide the names of types of animals. Then the learner can try to classify the animals by looking for similarities and differences. At the end, the discovered results can be verified by comparison with the scientific classification.

5. Ausubel's theory of meaningful reception learning

David Ausubel stresses the importance of linking new information to existing knowledge. To foster meaningful learning rather than rote learning, Ausubel recommends **advance organizers** (see Figure 3).

Figure 3 Advance organizer for this Concept Card



Advance organizers are introductory materials that provide an organizing structure to help students relate new information to existing knowledge. Advance organizers are broad statements presented at the outset of lessons. Usually they are relatively brief passages written in familiar terms often with schematic diagrams and illustrations.

In contrast to Bruner, Ausubel favors meaningful reception learning over discovery learning. Presenting new information to learners in an organized, meaningful way is as effective as discovery learning but much more efficient in his opinion. The instructor should present general ideas, concepts and theories initially, followed by specific examples (**deductive learning**).

There is no indication from research that one method (deductive versus inductive learning; see Figure 4) is superior to the other. A good instructor should use deductive and inductive learning to suit learners with different learning styles.

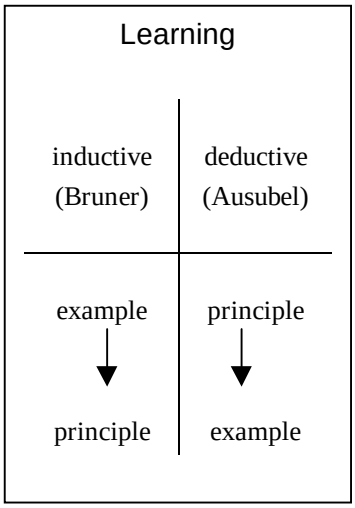
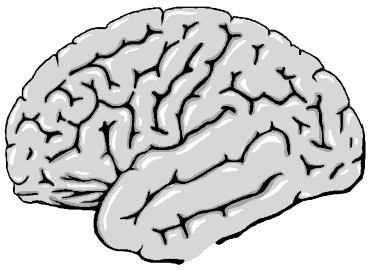


Figure 4 Inductive learning versus deductive learning

Conclusion

Most contemporary learning theories are subsumed under the heading cognitivsm. All these theories have a common focus on mental process like thinking, problem solving, and memory processes. They stress the difference between human and animal learning. Past experiences (thoughts and believes) influence present learning. As an instructor you have to organize learning in a way that allows the learner to related new information to already existing knowledge.

Learning Domains



Introduction

Any discussion of the teaching-learning process will soon lead to questions like "What should we teach?" or "What should be learned?" Should we teach theory? Should we teach skills? Should we teach attitudes? The simple answer is that all are important. You must consider all, regardless of the lesson content.

Knowledge

Knowledge is defined as:

"Information stored in the mind."

That information can consist of:

Facts

Facts are a one of a kind association among concepts (1 mile-1.6 kilometers). Facts are also specific names we give to objects.

Concepts

Concepts are classes of objects or events that share some common features and are known by a given name. A pen is one concept that is different from the concept of a pencil.

Principles

A principle is a rule that governs our environment. A rule is a statement of a relationship between two or more concepts. For example, $E=MC^2$ is the famous formula which shows the relationship between energy and mass.

Procedures

A procedure is a set of step-by-step instructions for doing something. Just knowing the procedure, however, does not mean that the person can actually *perform* the procedure. Some procedures are simple; others are complex requiring decision making at many points. An algorithm, or flowchart is an example of a complex procedure.

Processes

These are descriptions of how things work. An example would be: *The hiring process*.

Structures

These are relationships among a group of objects or concepts. An organizational chart shows the *structure* of the company.

Attitudes

Attitudes are defined as:

"Internal values, feelings, beliefs and drives."

Attitudes are classified as:

Observable

Observable attitudes are further classified as"

Personal skills

Personal skills are defined as "how a person deals with him or herself." Examples of personal skills are: a person's appearance, their personal hygiene, how they express themselves and their personal habits. If a person is always late, this is a personal habit.

Interpersonal skills

These skills relate to how a person "deals with others." Having good manners or being polite is an interpersonal skill. Interactive behaviors include skills such as summarizing, disagreeing, being open, blocking, and supporting.

Not Observable

Attitudes not directly observable are a persons feelings, values and beliefs. We can guess some of these attitudes when we work with a person.

Skills

Skills are defined as:

"Observable actions and reactions a person performs to achieve a goal."

Skills are classified as:

Cognitive

Cognitive skills, which are frequently overlooked in training programs, include problem solving, decision making, learning how to learn, logical thinking, critical thinking, and creativity. You must teach these skills to all learners so that they have the ability to adjust to a constantly changing work environment.

Psychomotor

Basic psychomotor skills involve physical action or motion. Occupational psychomotor skills are the "content" normally identified for training programs.

Repetitive

Many psychomotor skills are repetitive or heavily procedural in nature. These skills are accomplished in a step-by-step fashion. Examples: typewriting, shifting gears, taking blood pressure, installing a pump, tuning an engine.

Creative

There is a class of psychomotor skills, however, that require creativity and the application of principles or concepts for successful performance. Examples: design a page layout, drive defensively, format a document.

Conclusion

Knowledge, skills, attitudes--all must be learned--all must be taught.

A "Learning" Mind-map
(after Romiszowski, 1981)
KNOWLEDGE
ATTITUDES
SKILLS
Information stored in the mind
Internal values, feelings, beliefs, drives
Observable actions & reactions a person performs to achieve a goal
Facts
Concepts
Principles
Procedures
Processes
Structures
Interpersonal skills
Manners
Interactive behaviors
Personal skills
Appearance
Personal hygiene
Expressions
Habits
Not observable
Feelings
Values
Beliefs
Psychomotor
Creative
Repetitive
Cognitive
Problem solving
Decision making
Learning to learn
Logical - critical thinking
Creativity

Teach Knowledge

Introduction

For many years, famous educators and psychologists (Ausubel, Bruner, Clark, Gagne, Horn, Landa, Piaget, Skinner) have developed various ways to describe the different types of knowledge and have studied how each type is best learned and taught.

Teaching Facts

Let us say that you are teaching a business planning process. The process requires your learners to remember the following components of the process--**C**ontext, **I**nputs, **P**rocess, **P**roducts. Using a mnemonic device, "CIPP" would help the learners remember the components. Then, provide practice activities where CIPP is used to solve a problem.

Teaching Concepts

Let us say that you are teaching the concept of democracy. First, give a clear definition of democracy. Discuss the critical features that separate the concept of democracy from other concepts such as a monarchy. Provide many examples of countries classified as democracies. Describe the features of countries, which are <u>not</u> a democracy. You could also provide an analogy. An analogy is a simple story or parable, which helps to clarify a point you are making. A good analogy here would be to discuss how decisions are made in a family. In some families, all members play a role in decision making. In some families, one member makes all decisions.

To evaluate the learning of the concept, provide the learners with descriptions of various countries. Have them identify democracies. Ask learners to design a new democracy. They should describe how decisions would be made in the new country.

Teaching Principles

If you are teaching the principle of supply and demand, first, present the principle. Describe the cases where the principle can be used (in open markets) and where it can not (where markets are controlled.) Present many examples. Use graphs to show what happens when supply goes down or demand goes up. Provide simulations for learners to practice with the principle. Finally, evaluate the understanding of the principle by having the learner use the principle to solve specific market cases. Also, test to see if the learner applies the principle in cases where it should not be used.

Teaching Processes

Let us say that you are teaching business planning process. First, state the general process. Describe each component or step in the process. Use the process to show how different businesses would conduct planning (different types of businesses might use a slightly different process.) Provide learners with cases where they must use the process to develop a plan for that business. Finally, evaluate the plans to see if the learner is using the process correctly.

Teaching Procedures

The learning of a skill also has a knowledge component. This component is the procedure (list of steps) required to perform the skill. Let us say that you are teaching how to take the blood pressure of a patient. Provide the learners with a list of the steps in the performance guide. If the steps contain <u>new</u> facts or concepts--teach these first! Demonstrate the procedure slowly and carefully. As you demonstrate, explain the reason for each step and note any critical steps. Allow your learners to practice on each other using the list of steps as a guide. After a number of practices, the learners should be capable of performing the procedure without any memory aid or guide. Finally, evaluate the performance of each learner using the list of steps as a performance test.

Teaching Structures

If you are teaching about the relationship of solid objects, molecules, and atoms, an outline could be used to show this relationship:

Solid object

Molecule

Atom

Atom

Atom

First you would teach each concept (see Teaching Concepts above.) Using the outline you would show (with visuals) how many atoms make up a molecule, and then how many molecules make up a solid object. You could also show how the concepts should <u>not</u> be arranged. Finally, provide different exercises requiring the learner to apply the relationships.

Direct vs. Discovery??

The teaching examples above show the use of direct instruction. In most cases, discovery teaching techniques can be applied (even for procedures if safety is not involved!) Instead of giving the principle and then providing examples--try giving the examples first and have the students try to "discover" the principle. Such techniques take more time but your learners will remember the principle longer and better be able to use it. An exception is with the teaching of facts. If facts are important, teach them directly.

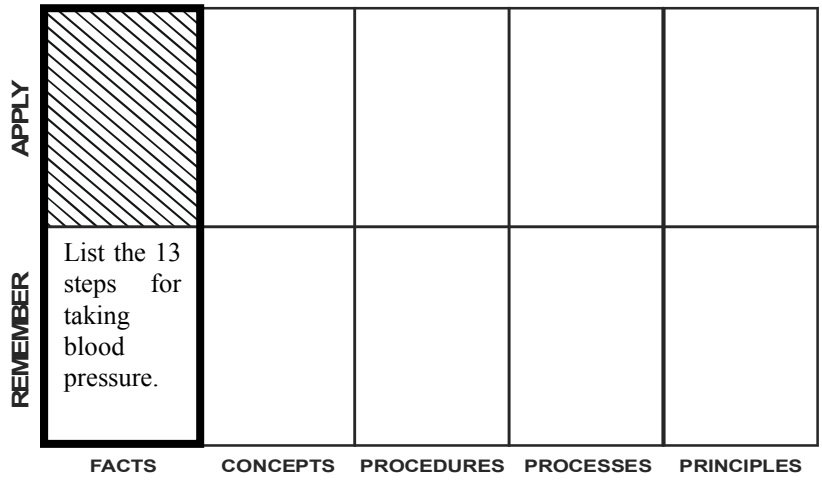
Conclusion

A great deal is known about the effective teaching and learning of knowledge. Put the information to use in "energizing" your theory lessons.

TEACH KNOWLEDGE

TYPE OF KNOWLEDGE	ANSWERS THE QUESTION	DEFINITION (examples) Types	TEACHING TIPS	EVALUATION TIPS
FACTS	What is this called?	One of a kind association among concepts 1 mile = 1.6 kilometers Mt. Everest is the highest mountain on the Earth. Individual specific names	Make sure the fact must be memorized Provide drill and practice Use job aids Give mnemonic cues Provide practice where facts will be used	Test repeatedly for critical fact retention Have learners use facts to complete tasks
CONCEPTS	What is this an example of?	Classes of objects or events that share some common features and are known by a given name Concrete: pens, chairs, bicycles Abstract: credit, honour, goal	Provide a clear definition Provide the critical features Provide many examples Provide non-examples Provide analogies	Test for ability to discriminate between correct and non-correct examples Identify new examples & non-examples
PRINCIPLES	Why is it so?	A basic true statement (the principles of learning) A cause and effect relationship that results in a predictable outcome (principle of conservation of energy) Rules that govern the behaviour of our environment (F=MxA)	Present the principle Describe where the principle applies and does not apply Present various related examples of where the principle applies and does not apply Provide for practice	Present cases where the principle should (and should not) be applied. (For many principles, there is no "one" correct answer. Identify a range of possible correct responses.)
PROCESSES	How does it work?	Descriptions of how things work (the hiring process, the purchasing process)	State the process Describe each component of the process Use the process to solve a problem or to make inferences	Create simulations or scenarios that require the learner to use the process knowledge to solve a problem or make an inference
PROCEDURES	What do I do?	Series of clearly defined steps which lead to the accomplishment of a task or operation (checklist, flow chart, algorithm)	Provide steps in written form Demonstrate each step clearly Provide for frequent practice with memory aids	Performance test with or without memory aid (remember--procedures contain both concepts and facts also!)
STRUCTURES	How is it organized?	Relationships among a group of objects or concepts (theories, models, organizations, outlines)	Is it important to memorize? Describe the objects or concepts Describe the relationships and linkages clearly	Provide simulations where the structure will be used to solve a problem or make a decision Provide exercises requiring learner to select the correct structure for a given scenario

Teach Facts



Introduction

This Skill Card is the second card in the series based on David Merril's Content-Performance Matrix and focuses on how to teach factual information.

Facts

Facts are unique, one-of-a-kind information. Following are the three basic types of factual information along with examples of each:

Concrete objects

4D session design form (a specific form)

NEC FG monitor (a specific piece of equipment)

Unique and specific data

One inch = 2.54 cm.

The Microsoft Mouse costs Rs. 1450.

Statements

We are operating at a net profit of Rs. 3,000,000 per year.

The order consisted of 250 pads of writing paper.

The Vice-President is Bishnu Sharma.

Facts – remember only!

Unlike all other types of information, facts can only be remembered. There is no way to mentally process a fact any further. Facts can only be held "as is" in memory. That is why the Content-Performance Matrix blanks out "Apply" for the content of facts.

As an example, imagine a computer salesperson. A customer has ordered a complete computer along with mouse and speakers. When it comes to writing up the order, a price must be assigned for each item. Here the salesperson must EITHER remember that the price of the mouse is Rs. 1450 OR know where to find the price. The price of the mouse represents a unique fact.

Identifying factual information

The job of a trainer is to examine the skill to be taught and identify the important facts that must be learned. The best way to identify facts is to closely examine the steps involved in performing the skill. Using our example skill:

Take blood pressure

read each step for this skill (see the Skill Card *Take Blood Pressure*) and write down as many facts as you can identify.

- The patient should be in position 3 minutes when lying or sitting.
- The patient should be in position 1 minute when standing.
- The manometer is no more than 3 feet from the observer.
- The blood pressure should be written down on the patient's chart (Form PC2000)…
- And many more

Is the piece of equipment called the manometer a fact? In this case, no. A manometer describes a general class or type of equipment—therefore, it is a concept. If the procedure called for a Bauer and Black #1435 Manometer, then the equipment would be a fact.

It is easy to overlook the biggest fact of all—the list of steps in the procedure itself! Will the trainee be required to memorize the list of steps? In this case the answer is yes. At least the eight key phrases must be memorized. Why? Why not allow the trainee to "look up" or find the procedure when needed? In case of an emergency, there would not be time to "find" the procedure—all nurses must have these steps memorized.

Learning objectives

Learning objectives for facts are "memorize" objectives. Using our example:

The nurse trainee will:

- Be able to write from memory the 13 steps for taking blood pressure; (STATEMENTS)
- State the recommended time in position for patients sitting, standing or lying; (SPECIFIC DATA)
- Fill in the blood pressure readings on Form PC2000; (CONCRETE OBJECTS)…

Teaching facts

The typical process for teaching facts involves:

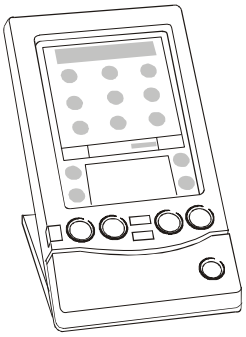
- Present the information
- Provide for practice
- Assess the learning

Depending on which type of fact is being taught, additional suggestions are:

Teaching concrete objects

The worst way to teach concrete objects is to use text only methods. Better ways involve the use of diagrams. Even simple line drawings are adequate and are actually better than photographs. Simple

line drawings reduce the information "overload." By omitting needless detail. Below is a line diagram for teaching the concrete object – A Palm Pilot Model I.



Teaching specific data

Facts in the form of specific data can often be clearly presented in the form of tables or bulleted lists. The example table below would help our computer salesperson:

ITEM	COST (Rs.)
Creative Stereo Speakers	2750
Microsoft Mouse	1450
Mouse pad	250
Zoltrix headphones with mike	1200

Having the table makes it easy for the salesperson to FIND the fact needed to complete the order. Note the table is alphabetized by item to make using it even easier.

Teaching statements

Take another look at two statements used above:

1. We are operating at a net profit of Rs. 3,000,000 per year.
2. The Vice-President is Bishnu Sharma.

Should a manager trainee be required to remember statement 1? Probably not. The trainee should however, know how to quickly FIND the information. The question here for the trainer is "How does the actual manager on the job, find answers to such statements?" Possibilities could be:

- Obtain a copy of the annual profit & loss statement for the company;
- Use the company's computer network to look up the information.

The best training design will require the trainee to use the same method for FINDing the information as is available on the job.

Now, how will we teach factual statement 2? We could require the trainee to memorize the name and title. Possibly a better way would be to show the trainee where to FIND an organizational chart for the company and how to read the chart.

FIND – the key to the modern worker

Already, the worker for the next decade is being referred to as the information worker. In almost every field, the worker who, when faced with a new problem, can access information (books, references, the Internet) and find a solution, will be the worker that succeeds. Training programs for new workers must provide the skills required to access the exploding information available today.

Practice activities

When designing practice activities for facts, consider why the worker needs the facts and under what circumstances. Since memory is limited, consider the following strategies:

Provide for job-aids

Allow the learner to use either hard-copy or online references to FIND factual information.

Provide drill and practice

If safety does not allow for the use of job aids, consider computer driven drill and practice. Research shows that after hundreds of drills, recall becomes automated.

Use oral questions

One aid to helping learners store factual information is the use of questions. Show the blood pressure manometer and ask learners how far away it can be while taking a reading. This is one way of visualizing factual information. Likewise, we could have a trainee lie down and ask the others "How long must the patient be in this position before taking his/her blood pressure?"

Provide mnemonics

If memorization is required, try and develop mnemonic devices to aid the learner.

Assess the learning

Finally, create realistic test items or simulations that require the learner to REMEMBER or FIND the facts in the same way they must later perform in industry.

Performance Guide

Teach Facts

Did the trainer:

1.	Analyze the performance guide for key facts?	Y	N
2.	Identify concrete objects?	Y	N
3.	Identify specific data?	Y	N
4.	Identify key statements?	Y	N
5.	Write objectives for each key fact?	Y	N
6.	Plan teaching strategies for each fact?	Y	N
7.	Provide for job aids, drill and practice oral questions or mnemonics?	Y	N
8.	Assess the learning?	Y	N

For teaching facts, any "N" checked means there is room for improvement in the training design.

	FACTS	CONCEPTS	PROCEDURES	PROCESSES	PRINCIPLES
APPLY		Select a manometer from various medical equipment.			
REMEMBER		List the characteristics of a manometer			

Introduction

This is the third card in the series based on David Merrill's Content-Performance matrix and focuses on how to analyze skills for underlying concepts and then how to best teach those concepts.

Concepts

Ruth Colvin Clark provides this definition:

A concept is a mental representation of objects or ideas for which multiple specific examples exist. Concepts all have *critical features* or characteristics that allow one concept to be distinguished from another. Concepts also have *irrelevant features* or characteristics that vary from example to example.

Consider the concept "chair." All chairs share four critical features. 1. Chairs are usually made for a single person to sit in. 2. Chairs have a back. 3. Chairs have a seat. 4. Chairs have some form of support to raise them off the floor. Chairs also have many irrelevant features. Color, cloth covering, and armrests are just a few.

Without concepts, our brain would have to store every possible type of chair into memory. With concepts, our brain only needs to store one image—then, we can apply that image to recognize the many types of chairs that exist—even if we have never seen that specific type of chair before.

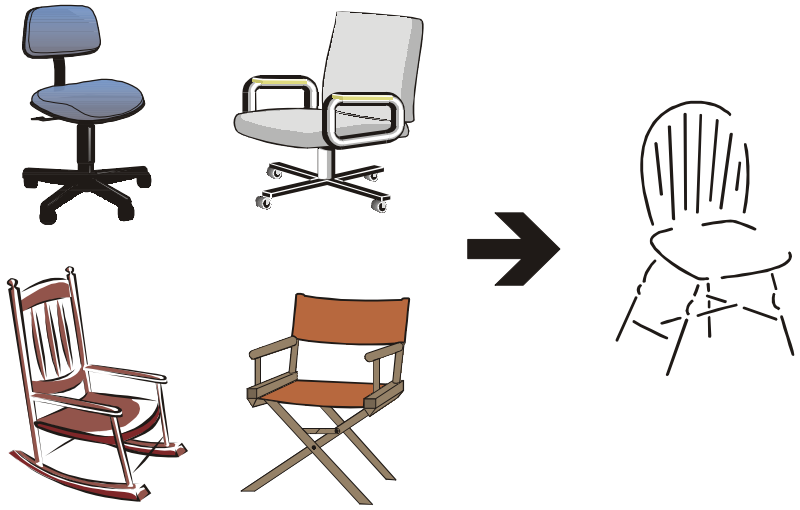


Figure 1 – Actual chairs vs. a mental image of a "chair"

Types of concepts

Concepts may be classified as either concrete:

- Chair
- Automobile
- Pencil
- Dog

Or as abstract:

- Democracy
- Honor
- Credit

Concepts – remember and apply

Unlike facts, concepts may be learned (and taught) at both the remember (and find) level as well as at the apply level. Trainees may be required to memorize a concept, or more important, may be required to apply the concept in realistic job situations.

Identifying concepts

Again, the best way to identify conceptual information is to closely examine the steps of performing the skill. Using the skill "take blood pressure" (Skill Card *Take Blood Pressure*) see how many concepts you can identify.

- Earpiece
- Stethoscope
- Patient
- Horizontally
- Restrictive clothing
- Manometer
- Artery
- Systolic sounds
- Absence of systolic sounds
- And more…

Learning objectives

Of these many concepts, some would probably have been taught before (stethoscope, earpiece, patient, artery.) Learning objectives would not be needed for these. The trainer may however, review these concepts at the beginning of the lesson. Some important conceptual learning objectives would be:

- Recognize clothing or clothing accessories that may restrict blood flow (Apply).

- List the characteristics of an aneroid and mercury sphygmomanometer (Remember).
- Select sphygmomanometers from an assortment of medical equipment (Apply).
- Recognize a normal range of systolic sounds (Apply).
- Recognize the point at which normal systolic sounds change or disappear (Apply).

Teaching concepts

When teaching concepts, always provide:

- A definition
- Relevant characteristics
- Examples

If possible, concepts can be strengthened by providing:

- Irrelevant characteristics
- Non-examples
- Analogies.

For the concept of a sphygmomanometer:

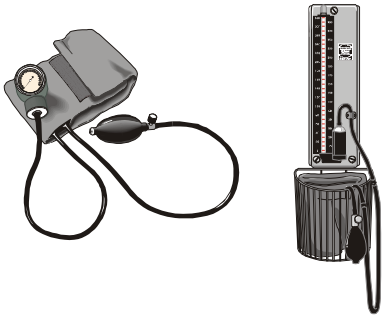
Definition

A sphygmomanometer is an instrument designed to measure blood pressure in millimeters of mercury.

Relevant characteristics

- Graduated dial gauge or glass column of mercury
- Rubber bulb for inflating the cuff
- Cuff to go around patients arm
- Rubber tubing connecting cuff to gauge and bulb

Examples



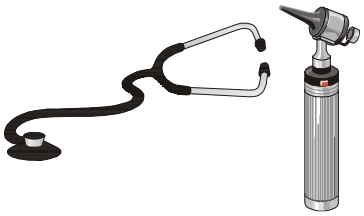
Irrelevant characteristics

Color

Weight

Mounting

Non-Examples



Analogies

An analogy is a simple representation that the learner is already familiar with. It is used as an aid to understanding the new concept. An example is the analogy of a camera lens when explaining the concept of the human eye. Analogies are helpful to a point but then they break down. A lens focuses by changing the distance between the lens and the image plane. The eye focuses by changing the shape of the cornea.

For taking blood pressure, the following analogy may be helpful:

Use your fingers to squeeze on a hose. If the water is running slowly with no resistance, you can cut off the flow with little effort. The greater the flow (if restricted) the more pressure required.

Practice activities

The application of concepts is more important than being able to give a definition. To provide for practice activities, have your learner discriminate the concept from new examples and non-examples. This can be done using real objects or pencil and paper exercises.

Assess the learning

To assess the learning of concepts, create realistic job situations where the learner must apply the concepts he/she has learned. In our blood pressure example, don't just give the instrument to the nurse trainee—require him/her to go and select the right instrument depending on the situation.

Performance Guide

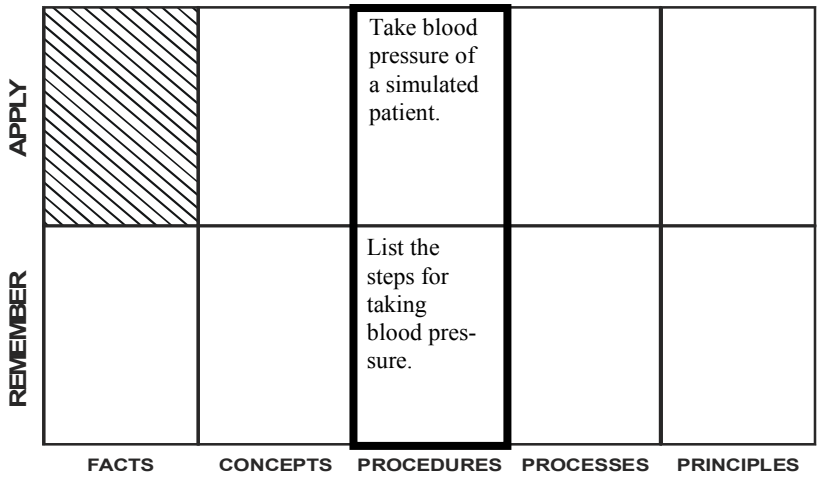
Teach Concepts

Did the trainer:

1.	Analyze the performance guide for key concepts?	Y	N
2.	Write objectives for each key concept?	Y	N
	For each concept:		
3.	Provide a definition?	Y	N
4.	Provide the relevant characteristics?	Y	N
5.	Provide examples?	Y	N
6.	Discuss irrelevant characteristics?	Y	N
7.	Provide non-examples?	Y	N
8.	Provide analogies?	Y	N
9.	Provide for discrimination practice activities?	Y	N
10.	Provide for realistic assessment?	Y	N

For teaching concepts, any "N" checked may indicate a gap in the learning of your trainee.

Teach Procedures



Introduction

This is the fourth card in the series based on David Merrill's Content-Performance matrix and focuses on how to teach the procedures for performing a skill.

Definition

The TITI Glossary defines procedure as:

A series of related steps performed to accomplish a task or skill.

Some examples of skills are:

- Format a floppy disk
- Bake a chocolate layer cake
- Clean spark plugs

Each of the skill listed above has an associated procedure which details the "best way" to perform the skill.

Procedures are vitally important to business and industry. A large percentage of all work is procedural. Likewise, most of the training conducted for business and industry is training focused on procedures.

There are two major types of procedures:

Linear procedures

Linear procedures are made up of an easily observable series of steps that rarely change. Step three always follows step two. The procedure for formatting a floppy disk is an example of a linear procedure.

Decision procedures

Decision procedures are made up of two or more linear procedures, connected at some point by one or more decisions. A decision procedure is like a flow chart—depending on the answer to the decision question, the procedure may follow one branch or the other. Many troubleshooting skills are of the decision type. The worker tests something. If it is faulty the item is replaced—if not, the next item is tested.

Procedures – remember and apply

Like concepts, procedures may be learned (and taught) at both the remember (and find) level as well as at the apply level. Trainees may be required to memorize the steps of a procedure, or more important, may be required to apply the procedure in realistic job situations.

Identifying procedures

In teaching skills, many curriculum guides provide the procedure for each skill to be taught. If the procedure is not provided, then the trainer must either find or determine the best procedure. In the case that a procedure is not available, refer to the Skill Card *Develop a Performance Guide*. For our example here, we will use the procedure for "take blood pressure" (Skill Card *Take Blood Pressure*).

The role of cues

For each procedure, the question arises, "When should the worker perform (or not perform) the procedure?" A cue is defined as:

The signal or event that causes a worker to perform a specific procedure.

A cue may be external. A buzzer may sound or a warning light go off. A customer may make a request. A skill may be performed only at a certain time of day.

Cues may also arise from internal mental processes that are not so easily observed. The worker may decide—maybe I should back up my data now. The nurse may think, "This patient looks a little different—maybe I should check his/her temperature."

Some procedures are initiated with a single cue. Others require multiple cues before performance is undertaken. For the skill "prune a fruit tree" there are multiple cues. The time of year must be right and the tree must be in need of pruning.

When teaching procedures, the cues are just as important as the steps of the procedure. Cues must be taught, practiced, learned and assessed.

Learning objectives

Both the procedure and the cues for the performance make up the content. Outcomes may be at the remember (or find) or apply level. Therefore, the following learning objectives may be used for our example skill:

- List the cues for taking blood pressure (Remember).
- List the steps for taking blood pressure (Remember).
- Use the Internet to find alternate procedures for taking blood pressure (Remember-find).
- Take the blood pressure of 10 simulated patients (Apply).

Teaching procedures

The effective teaching of procedures requires:

- A clear list or display of the steps for the procedure;
- One or more demonstrations of the procedure.

A performance guide

Trainees should be given the procedure in written form prior to the demonstration. Guidelines for this "performance guide" are:

- Contain no more than 12-15 steps;
- Cues are included;
- Each step beginning with an action verb;
- Complex operations broken down into simple to follow steps;
- The performance guide should be "visualized" wherever possible (See the Skill Card *Take Blood Pressure*.)

The trainer should field test any performance guide with typical trainees prior to adopting it.

A demonstration

The demonstration provided, should meet the following guidelines:

- The demonstration must follow the performance guide exactly;
- The cues for the performance should be stressed;
- A slower than normal demonstration is effective for the first demonstration;
- At some point, the procedure should be demonstrated at normal speed;
- The trainer should insure that trainees are following along on their performance guide by asking questions.

For additional help on giving good skill demonstrations, see the Skill Card *Give a Demo*.

Practice activities

The application of procedures is more important than being able to list the steps from memory. To provide for practice activities, have your learner practice the procedure over time. The first practices should be slow, safe and with a coach. The trainee should refer to the performance guide for each step. The trainer must be present to provide feedback and feedforward.

Over time, the speed of the trainee will increase and the use of the performance guide will decrease. Refer to the Skill Card *Plan Practice Activities* for a complete overview on this subject.

How much is enough?

It is safe to say that a skill is not learned by performing it once. Factors that determine how much practice is required are:

Skill criticality

If the skill is critical to the business or industry, if the misperformance of the skill could lead to expensive equipment being damaged, then more practice is called for.

Skill hazard

If the performance of the skill could be dangerous to the worker or colleagues, more practice is called for.

Learner ability

Some learners require fewer practice opportunities to master a skill than others. If the trainer must certify that all trainees have mastered the skill, the some will need more practice than others.

Assess the learning

The best way to test for procedural learning is with a "hands-on" or performance test.

To assess the learning of procedures, create realistic job situations where the learner must perform the skill he/she has learned. In our blood pressure example, the learner should perform the skill on cue, on a simulated patient in a hospital-like setting while the trainer follows along on the performance guide.

Performance Guide

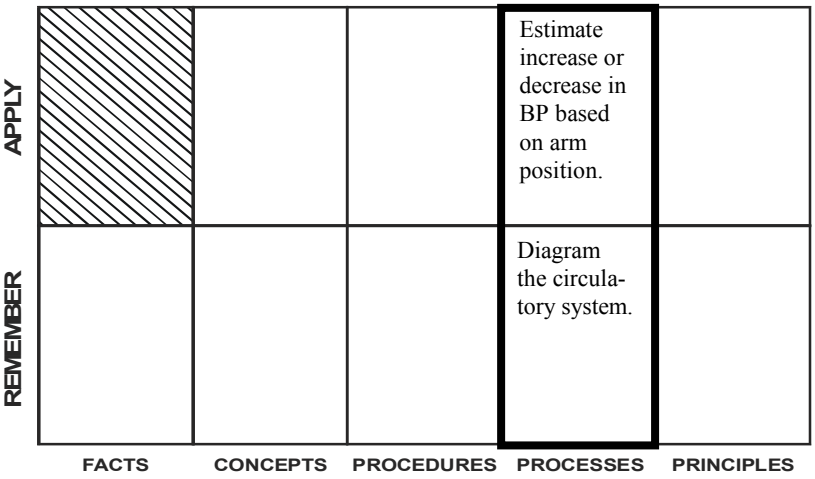
Teach Procedures

Did the trainer:

1.	Find or develop a performance guide?	Y N
2.	Find or develop the cues for the procedure?	Y N
3.	Write objective(s) for the cues?	Y N
4.	Write objective(s) for the procedure?	Y N
5.	Provide the each trainee with a performance guide?	Y N
6.	Demonstrate the procedure according to the performance guide?	Y N
7.	Provide for adequate practice opportunities so that each trainee can master the skill?	Y N
8.	Assess learning with hands-on or performance tests under realistic job settings?	Y N

For teaching procedures, any "N" checked might indicate trainees who cannot perform.

Teach Processes



Introduction

This is the fifth card in the series based on David Merrill's Content-Performance matrix and focuses on how to analyze skills for underlying processes and then how to best teach those processes.

Definition

While procedures are directive in nature, processes are descriptive. In many cases, workers can perform a skill without fully understanding why they are doing it (the big picture.) This often results in reduced levels of performance.

A process is:

A description of how things work.

There are two main types of processes:

Technical or natural

Examples of technical or natural processes are:

- The life cycle of a reptile
- The photosynthesis process
- Chemical oxidation
- Internal combustion
- The circulatory system
- Mining of gold
- Manufacture of aluminum

Technical or natural processes take place the same way regardless of the situation.

While these processes are considered by some trainers as "nice-to-know" information, in many cases, if the trainee understands the processes underlying skills, their procedural performance improves.

Furthermore, understanding processes contributes greatly to the "far transfer" of the learning. Even if the procedure later changes, the worker that understands processes might be able to adapt to the new situation.

Business

Examples of business processes are:

- The hiring process
- Customer billing
- Software development
- Decision-making
- Customer satisfaction
- Promotion

Business processes are situational. The hiring process, for example, would be quite different from a large to a small company.

There is an additional motivational value to business processes. When employees see how the work they are doing fits into the overall goals of the company, their procedural work often improves.

Processes – remember and apply

Processes may be learned (and taught) at both the remember (and find) level as well as at the apply level. Trainees may be required to memorize a process, or more important, may be required to apply the process in realistic job situations.

The application of processes involves:

Solving a problem

Here, the trainee is given a realistic job problem and asked what he/she would do. The trainee must apply the process to the specific situation to come up with the answer.

Making an inference

An inference is an action or decision that goes beyond the process. In a specific situation, the worker may find that the hiring process (for example) does not quite apply. Yet the worker may still make a decision based on the overall intent of the process. The intent may be to be completely fair and impartial. As long as the workers decision leads to a fair and impartial outcome (the goal of the process), the inference is probably correct.

Identifying processes

Processes are more difficult to identify than facts or concepts. A process may form the foundations for an entire series of skills. To identify processes, closely examine the steps of performing the skill. For each step, ask yourself "Why?" that step is required. Could there be an underlying process? Using the skill "take blood pressure" (Skill Card *Take Blood Pressure*) see how many processes you can identify.

- Preventing the spreading of germs (Asepsis)
- Patient care
- The circulatory system
- Basic hydraulics and pressure

Learning objectives

Of these processes, some would probably have been taught before (Asepsis, patient care.) Learning objectives would not be needed

for these. The trainer may however, review these processes at the beginning of the lesson. Some process learning objectives would be:

- Diagram the circulatory system (Remember).
- Describe asepsis techniques to be used with patients (Remember).
- Estimate how arm position relative to the heart will affect blood pressure (Apply).
- Describe the effect clogged arteries has on blood pressure (Apply).
- Explain why it is important for the patient to be calm prior to taking blood pressure (Apply).

Performance Guide

Teach Processes

Did the trainer:

1.	Analyze the performance guide for key processes?	Y	N
2.	Write objectives for each key process?	Y	N
	For each process:		
3.	Provide a title?	Y	N
4.	Provide a description or purpose?	Y	N
5.	Tell why the process is important?	Y	N
6.	Provide a diagram, flow diagram or table of the process?	Y	N
7.	Describe situations where the process applies?	Y	N
8.	Describe situations where the process does not apply?	Y	N
9.	Provide for adequate problem-solving practice activities?	Y	N
10.	Provide for realistic assessment?	Y	N

For teaching processes, any "N" checked may indicate a gap in the understanding of your trainee.

Teaching processes

When teaching processes, always provide:

- The title of the process;
- A description of the process;
- A diagram, flow diagram or table of the process (see figures 1,2,3);
- Why the process is important;
- The situations where the process is applicable;
- The situations where the process is not applicable.

When designing aids for learning processes, remember that visuals and diagrams are more effective than tables.

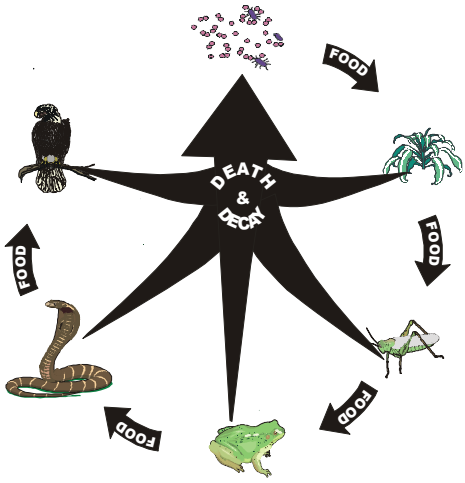


Figure 1. Diagram

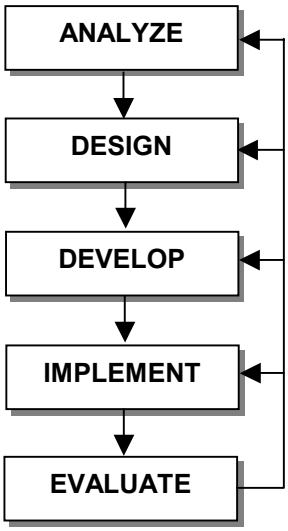


Figure 2. Flow diagram

WHO	DOES WHAT	BY WHEN
Head of Departments	Submit final grades	Three days after semester ends
Dean of College	Signs grade report forms	Five days after semester ends
Director of Admin	Mails forms to students	Two weeks after semester ends

Figure 3. Table

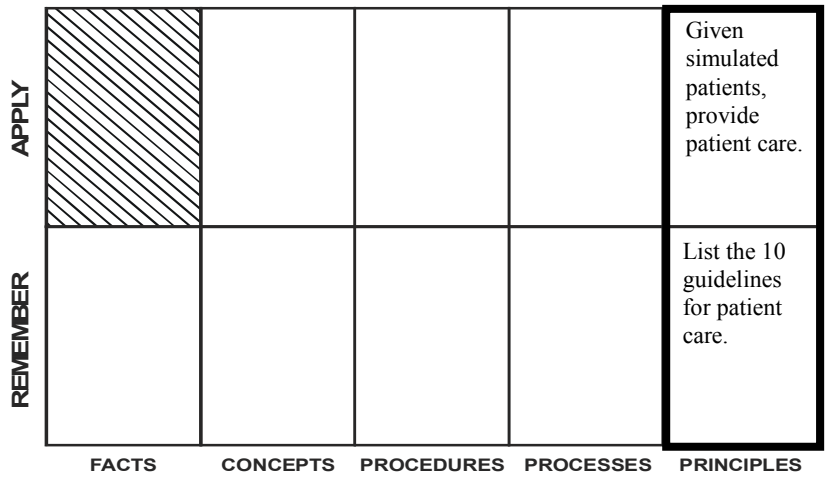
Practice activities

The application of processes is more important than just being able to draw them from memory. To provide for practice activities, give your learner typical job-realistic problems where they have to apply the processes to make a decision. Then provide unusual situations where the trainee may have to make an inference from the process. All of these may be done using simulations or pencil and paper exercises.

Assess the learning

To assess the learning of processes, create realistic (typical and unusual) job situations where the learner must apply the processes he/she has learned.

Teach Principles



Introduction

This is the sixth card in the series based on David Merrill's Content-Performance matrix and focuses on how to analyze skills for underlying principles and then how to best teach those principles.

Definition

A principle is defined as:

A statement or series of statements (algebraic or textual) that defines the relationship (actual or desired) between two or more concepts.

Principles may be classified as either scientific or guidelines.

Scientific

Examples of scientific principles are:

- $E=MC^2$
- Newton's third law
- Bernoulli's principle
- The Pythagorean theorem

Einstein's famous theory describes in algebraic form, how energy, mass and the speed of light are actually related to each other.

Guidelines

In business, principles are often called guidelines. Examples are:

- Customer relations guidelines
- "Greater productivity results when employees have a say in their work design."
- "The customer is always right."
- "Positive motivation works best."
- Equity guidelines for employment

The statement "The customer is always right" describes the desired relationship between a customer and a company.

Principles and far transfer

When we teach procedures, we are teaching for near transfer. In other words, what we are teaching relates to the job as long as the skill or procedure does not change. Unfortunately, in a rapidly changing technology, procedures often change rapidly.

Principles and guidelines are different. When our trainee learns to apply a principle or guideline, that learning is good for a long time. Principles and guidelines do not change rapidly over time.

Likewise, a procedure is good for one specific situation. A principle or guideline can be transferred to many situations.

There is no doubt that modern workers are fast moving from a procedural-based work environment to one where they are required to face new situations and make decisions based on general guidelines.

Principles – remember and apply

Principles may be learned (and taught) at both the remember (and find) level as well as at the apply level. Trainees may be required to memorize a principle or list of guidelines, or more important, may be required to apply the principle or guidelines in various and realistic job situations.

Identifying principles

One way to identify principles is to closely examine the steps of performing the skill. Using the skill "take blood pressure" (Skill Card *Take Blood Pressure*) see how many principles or guidelines you can identify.

- Guidelines for patient care and safety

For other skills, principles may be more difficult to identify. For the skill *Troubleshoot a D-C Circuit*, an underlying scientific principle would be Ohm's Law.

In some instances, teaching principles replaces teaching skills. Then the question becomes, what principles should be taught and how does the trainer identify them? Guidelines can be identified by:

- Observing or interviewing expert workers and noting what they have in common when they do a specific type of work;
- Forming a group of expert workers and have them develop guidelines for the work they do;
- Conducting literature reviews;
- Conducting a cognitive task analysis on expert workers.

Learning objectives

For our single principle, the trainer may wish to review the hospital guidelines at the beginning of the lesson. Example learning objectives could be:

- List the hospital guidelines

for patient care and safety (Remember).

- Use the Internet to find other guidelines for patient care and safety (Remember-find).
- Given any patient-room situation, provide for patient care and safety according to the hospital guidelines (Apply).
- Given a photograph of a patient-bed situation, identify care or safety violations (Apply).

Teaching principles

When teaching principles:

- Provide the principle or guideline;
- Provide a number of situation examples to illustrate how the principle or guidelines would be applied and the outcome of the application;
- Provide a number of situation non-examples where the principle or guidelines are applied improperly and the outcome of the misapplication.
- Provide analogies that aid in understanding or remembering the principle. An example here is the analogy of water in a hose in describing electrical voltage and resistance.
- Present a number of simulations where the principle or guidelines are being applied. Have the trainee identify effective applications and non-effective applications.
- Finally, place the trainee in simulations that require him/her to apply the principle or guidelines by solving problems or making inferences.

Practice activities

The application of principles is more important than being able to give a definition. To provide for practice activities, have your learner discriminate the principle from new examples and non-examples. This can be done using real objects or pencil and paper exercises.

The sooner the trainee is required to use apply the principles in simulated, or even better, actual job situations the better the principle will be learned. Here is where a good job re-entry design is critical. If immediately after the training, the worker is required to apply the principle on-the-job, then the success of the training will be maximized.

Assess the learning

To assess the learning of principles, create realistic job situations where the learner must apply the principles he/she has learned. In our blood pressure example, make sure the care and safety of the patient is demonstrated by the trainee along with the correct procedure for taking the blood pressure.

From principle to action

A mini-case study

At Rich's Department Store in Atlanta, Georgia, the guiding principle of the company for fifty years was:

The customer is always right.

You are working in the Rich's Department that handles merchandise returns. A customer comes in to return a product—a jacket. The jacket is obviously over a year old, and is dirty and torn. You are sure that the store has never sold this type jacket. The customer says the jacket was defective and wants a new one. What will you do?

Performance Guide

Teach Principles

Did the trainer:

1.	Analyze the performance guide for key principles?	Y N
2.	Write objectives for each key principle?	Y N
	For each principle:	
3.	Provide the principle or guideline?	Y N
4.	Illustrate situations where the principle applies?	Y N
5.	Illustrate situations where the principle does not apply?	Y N
6.	Provide analogies to aid in understanding?	Y N
7.	Have the trainee identify effective applications of the principle?	Y N
8.	Have the trainee identify non-effective applications of the principle?	Y N
9.	Provide problems that require the trainee to apply the principles?	Y N
10.	Provide problems that require the trainee to make inferences from the principle?	Y N

For teaching principles, any "N" checked may indicate a gap in the understanding of your trainee.

Design Training Sessions (The 4D Method)

Introduction

Dozens of books and hundreds of articles have been written on "How to design effective training sessions." This Skill Card presents a simple design tool that takes the mystery out of good training design. At first, the tool seems too simple to work, but work it does. When used by a trainer with a little bit of creativity and some time for preparation, this tool can lead to learner-centered training sessions that really work!

Concept

Based on a training design concept developed by Ruth Sizemore House, a corporate training consultant from Atlanta, Georgia, designing effective training sessions is as easy as 1-2-3-4, A-B-C-D. All the trainer has to do is answer four questions (the fourth question has four parts.) These questions are listed in Table 1.

This design process places the emphasis on the learner and on learner-centered activities, visuals and aids. Instructor input is planned last and ONLY if additional input is needed.

Table 1- The 4D Questions

1. **What must the learner be able to do on the job?**
2. **How do you do it?**
3. **What must the learner do in class to show he/she is ready to perform on the job?**
4. **How can instruction help?**
   - **A. What learner activities or experiences will help?**
   - **B. What visuals or job-aids will help?**
   - **C. What other instructor input will help?**
   - **D. What future projects or problems will help?**

1

The primary purpose of training is to improve performance on the job. Notice the word "do" in question 1. The word "do" implies performance. For a successful training, we must have a clear picture of the performance that is expected of the learner. To design an ideal training session, we should know two things. First, how is the learner currently performing on the job? Second, we must know what performance is desired? Knowing these two items allows the trainer to plan activities that will achieve the desired performance in a minimum amount of time.

For the trainer, the above means that every training session should focus on a specific skill.

Example:

Skill: *Take oral temperature*

The nurse will take oral temperature according to the hospital procedures manual on patients of all ages and record the temperature correctly on the patient's chart. If the temperature is out of the normal range, the nurse will immediately notify the supervisor.

2

For every skill, the trainer must be prepared to demonstrate the performance expected of the learner. In most cases, this means that some form of performance guide or checklist is available for each skill. Developing a performance guide requires observing an expert worker actually performing the skill. The step-by-step procedure is recorded in simple clear statements. In many cases, this means that for each skill, time standards or other important criteria for acceptable performance must be available.

3

Again, in question 3 the key word here is "do." Training should never end before the learner has successfully demonstrated, the performance expected upon return to the job. This demonstration of new skills often takes on the form of a performance test. This test should closely simulate actual working conditions. Criteria for the performance test should be the same (or even higher) than those expected back on the job.

Example:

The learner must take and chart one correct temperature reading per day on a simulated patient for a one-month period of time.

Many instructors call this statement a **TPO**-Terminal Performance Objective.

4

Question 4 does **NOT** say, "How can the instructor help?" Here, the word "instruction" implies all components of the teaching-learning process. Some of these components are:

- The learner
- Other learners
- Instructional materials
- Instructional resources (textbooks, journals, etc.)
- Equipment and supplies
- Subject matter experts
- The instructor

Question 4 has four sub-questions that must be answered in sequence:

A

This planning tool forces us to begin with learner activities. We already know what the learner must do in class to show us they are ready to perform back on the job. Now we ask what learner activities will HELP the learner prepare for the final performance test. Typically, the answer to this question is to provide some form of practice activities. Guided practice, independent practice, games; simulations are effective depending on the skill being learned. The trainer, at this point, will usually identify more than one activity or experience that will benefit the learner.

Examples:

- *Read the Nursing textbook section on taking oral temperature*
- *Observe a demonstration by an advanced learner*
- *Take a written test on thermometer reading*
- *Study the handout on Proper Charting*

B

A picture is worth a thousand words. In training, the importance of good, clear visuals can not be over emphasized. For many skills, a good visual or set of visuals can provide the only instruction needed by the learner. For more complex skills, aids or "job-aids" can provide the key to performance. A job-aid could be a small flipbook containing visuals and text, which describes exactly what the learner should do given any circumstance. A checklist can also be a job aid.

The wise trainer analyzes the skill, and prior to the training, develops key visuals and job-aids that greatly assist the learning process. Another very effective learning strategy is to allow the learner or a group of learners to develop their own visuals or job-aids to assist their performance.

Examples:

- *Make a diagram of a standard thermometer showing all graduations*
- *Study the Performance Guide*

C

For an experienced trainer who has done a good job answering questions 4A and 4B, the answer here may be NOTHING! In other words, good learner activities and experiences combined with effective visuals and job-aids may completely eliminate the need for most instructor input.

Even when instructor input is still needed, the wise trainer will think of creative methods and techniques that can substitute for lectures. Peer instruction, guest speakers, library assignments, experiments, independent study—all can take the place of a dull lecture and result in MORE long-term learning and better performance.

Examples:

- *Assign advanced learner to coach new learner*
- *Observe the learner demonstration of proper technique.*

D

Every individual skill taught-should be reinforced at various times during the training. The best way to do this is to assign projects and problems that require the learner to apply the skill with other skills under real-world conditions. Starting with simple, structured projects and, over time, proceeding to ill-structured, real world problems, is an excellent way to produce competent and confident graduates.

Conclusion

Designing effective training sessions is no mystery. Specify what is to be learned (the skills) and how the skill is performed. Specify what the learner must do during training to prove they are ready to perform on the job. Put the learner and effective visuals and job-aids at the center of your instruction.

It really is as simple as:

1-2-3-4, A-B-C-D!

Performance Guide

Design Training Sessions – The *4D* Method

Did the trainer, in sequence:	**YES**	**NO**
1. Specify what the learner must be able to do on the job?	____	____
2. Specify how the new skill is performed and to what standard of performance?	____	____
3. Specify what the learner must do in class to prove that he/she is ready to perform back on the job?	____	____
4. Design the instruction that will lead to the in-training performance?	____	____
A. Design learner activities or experiences that will help?	____	____
B. Design (or assign to be designed) visuals or job-aids that will help?	____	____
C. Design other instructor inputs that will help?	____	____.
D. Design future projects and or problems that will help?	____	____

For a successful training design, all items should be marked "YES."

Plan Practice Activities

Introduction

The old expression, "Practice makes perfect" is not quite correct. Only perfect practice makes perfect! Learning a skill does not end with a lecture, or with a demonstration. Provide the learner with practice activities--activities that are well planned and, most important of all, ENOUGH practice opportunities.

Competence AND Confidence

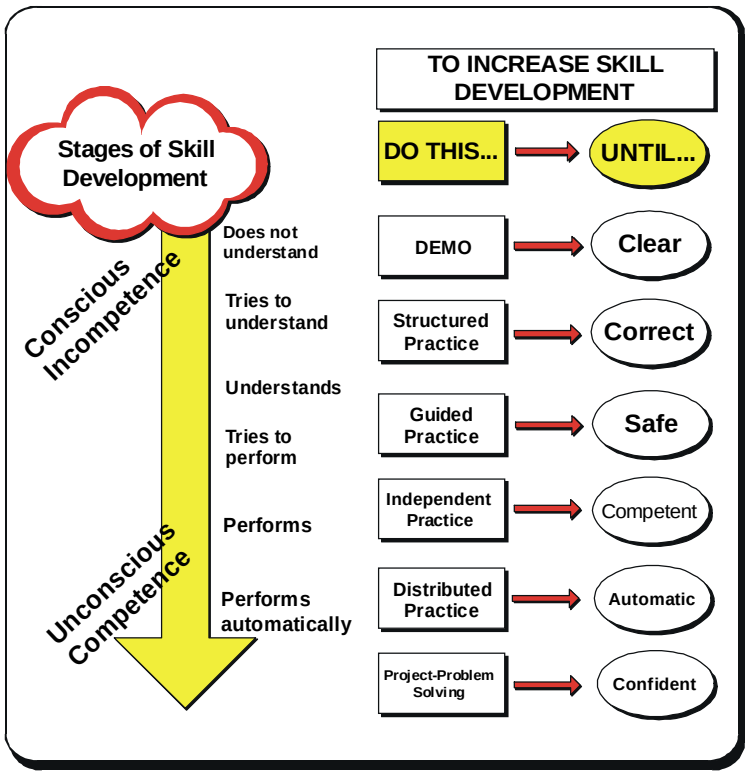
Many training programs only focus on building competence. A competent worker can perform a given skill. However, is competence enough? Increasingly, industry is saying "NO!" Even competent workers sometimes hesitate in their performance. Industry wants a worker who can perform the skills needed in any situation or conditions. This worker must be able to solve problems, modify procedures, and co-operate with colleagues to develop solutions. The worker must see the relationships between each skill and the job as a whole. Such a worker is both competent AND confident.

Stages of Skill Development

The graphic on this page shows the key stages that learners progress through as they learn skills. At first, the learner is aware that he/she does not know how to perform the skill. Understanding is minimal (*conscious incompetence*). Over time, and with good instruction, the learner acquires understanding and is able to perform the skill without much thought (*unconscious competence*.)

The following planned activities develop skills:

Demonstration: The initial demonstration must be correct. The learner will remember and repeat what he/she sees first. For most skills, a performance guide is necessary. Repeat the demonstration until all learners are CLEAR about the procedure.



Structured Practice: If the procedure is critical, the instructor should perform a few steps of the skill. Then have the learners repeat the same steps exactly. The instructor then checks that all have performed correctly before continuing. Repeat the sequence until the procedure is complete. Structured practice continues until all learners can follow the CORRECT procedure with only the help of the performance guide.

Guided Practice: Learners work individually or in pairs under the close supervision of the instructor until their performance is SAFE. During this phase, it helps to have learners *say aloud* what they are going to do next.

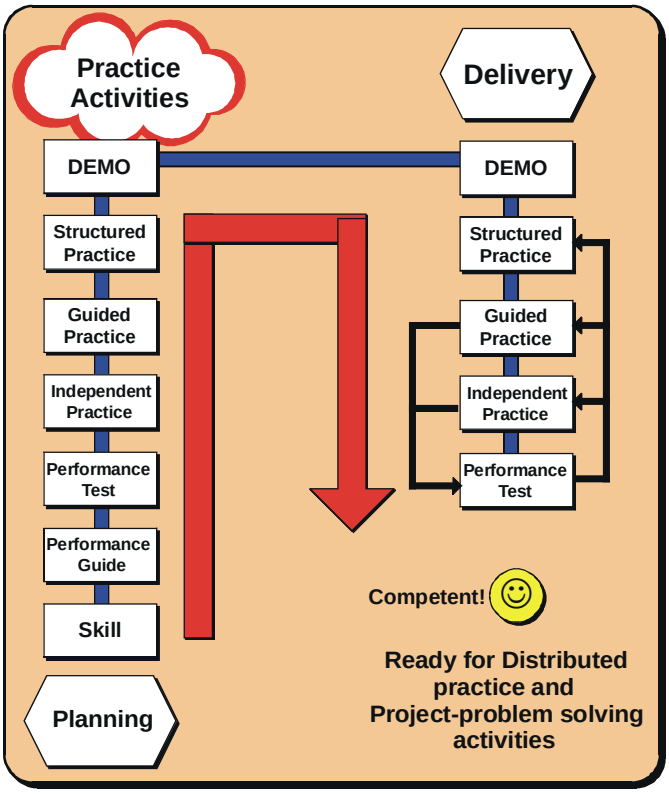
Independent Practice: Learners work under less and less supervision until their performance is COMPETENT. Competent usually means at the entry performance level of a new worker.

Distributed Practice: Periodically (weeks or months) after learning a skill, the instructor should have the learner again demonstrate the performance of that skill. Distributed practice contributes towards making the performance AUTOMATIC.

Project or Problem-Solving Activities: After a group of skills has been learned, the instructor should provide projects or problem-solving activities. These require the learner to select the needed skills, and then modify or apply the skills as required. Sometimes, require learners to perform the skills under unusual conditions. These activities simulate the real world of work as much as possible and build learner CONFIDENCE.

Planning

Carefully select and design practice activities which provide the learner with the quality and quantity of practice that they need. As shown by the graphic on the next page, the planning of practice activities takes place in the *reverse order* of the delivery of the same activities. In planning, begin with the skill. Next, develop a performance guide. Then, performance tests, either



for the procedure or for the product are developed. Finally, design the different levels of practice activities-- make sure to provide each level with adequate time for practice.

Delivering

After the demonstration, learner practice begins. If the procedure is critical to safety, use structured practice. Also use structured practice if the procedure is very complicated or lengthy. As the flow arrows show on the graphic, the learner may choose to take the performance test at any reasonable time during practice activities. If the learner passes the test, the learner is marked as "competent" for that skill. If the learner does not pass the test, more practice is required.

After passing the performance test, learners should be required to perform the same skill after a period. Such distributed practice leads to long-lasting performance.

After a series of skills has been learned, the instructor should provide projects or problem-solving activities for teams of learners to solve. These activities build confidence, communicating, and group dynamics skills in learners.

How much is enough?

Learners are ready to progress to the next stage of practice when they can operate at 85 to 90% level of accuracy or speed for that practice level. The instructor should set accuracy and speed criteria for each level of practice. These "targets" provide the learner with an easily achievable intermediate goal, which create a feeling of success when reached.

Conclusion

Instructors spend hours designing their lectures and demonstrations and then write on their lesson plan "*Allow time for practice*." Do not make this mistake—get serious about designing effective practice activities that will build both competence and confidence in your learners.

Performance Guide
Plan Practice Activities

Did the instructor:

- In designing the practice activities for a single skill:

1. Develop a performance guide?
2. Develop performance tests (procedure/product)?
3. Consider the number of learners, the amount of equipment and materials?
4. Determine the amount of independent practice needed?
5. Determine the amount of guided practice needed?
6. Determine if structured practice is needed?
7. Design the demonstration activity?

- In implementing practice activities for a single skill:

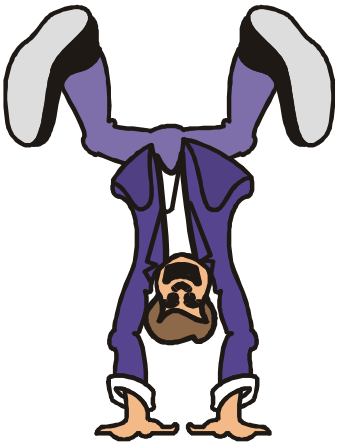
8. Demonstrate the skill until the skill is CLEAR?
9. Conduct structured practice until procedures are CORRECT?
10. Conduct guided practice until learners are SAFE?
11. Conduct individual practice until learners are COMPETENT?

- Periodically, after teaching a series of skills:

12. Provide distributed practice for individual skills until performance is AUTOMATIC?
13. Provide project or problem-solving activities using many skills until learners are CONFIDANT?

For competent, confident workers, all responses should be "Y."

Introduce a Lesson



Introduction

"Great is the art of beginning'

- Longfellow

First impressions are critically important. A lesson needs a strong introduction because the first three minutes of the introduction set the pace for the whole lesson. The introduction should be effective enough to gain attention and stimulate a desire in the learner to learn what is to come. Only learners who are ready to learn will learn.

Purpose

A good introduction:

- attracts the attention and arouses the interest of the learner
- establishes links with past and future lessons
- provides the aim of the lesson and objectives to be achieved
- points out the importance of the skill
- describes what will happen during the lesson.

Techniques

There is no single best technique for introducing a lesson. The secret of giving great introductions lies in variety and creativity. The lesson introduction is the best place for the actor that lives in every teacher to come out and ACT! Following are a few techniques to help you get started:

Gain attention and interest

There are many useful techniques for getting the attention of your learners. Here are a few:

- Be enthusiastic! If you appear bored, your learners will soon follow.
- Show real objects, cartoons, models, and high impact visuals. Move to the center of the class and closer to the learners.
- Use appropriate humor, jokes, a short story, a poem, a personal story, a news event, related to the topic.
- Ask a challenging question.

  Why can a bird sit on an electrical wire without being killed?
  Why is the sky blue?
- Surprise or startle the learners with an unexpected statement or action.
- Perform a role-play and then ask, *What happened?*
- Ask a series of questions.

  Have any of you broken any bones?

  What did it feel like when you had a fracture?
  How did you know you had a fracture?

  What were the symptoms?
- Give an interesting demonstration.
- Distribute an interesting handout.
- Show a nice product and ask, *Would you like to be able to build this?*

Provide for a review or preview

The lesson introduction provides an excellent opportunity to link the old with the new. Review the previous lesson and describe how the new skill or concept builds upon that experience.

Give your learners a preview of how the new skill fits into the overall program or course.

Provide lesson objectives

Allow time to thoroughly discuss your expectations of your learners. Discuss the objectives of the lesson. Ask questions about the objectives until you are convinced that all learners know exactly what they must be able to do.

Provide an overview and/or key points

Now is the time to tell the class a little about the lesson. Here, you should:

- Describe the activities that will soon follow.
- Hand out an advanced organizer that provides a clear structure for the lesson (such as a model, outline or mind map.)

Every session needs to be structured in terms of ideas and topics. One way of doing this is to think of the questions or problems that the session will answer or solve. These questions or problems will of course be related to the learning objectives. Using the example of fractures, the instructor could say,

Today class, we are going to learn the following:

How you can identify a fracture of you hand/leg?

What you should do when you find a person who has a broken hand?

How you can provide first aid for the fracture of a hand/leg?

The transition

A good introduction never just abruptly stops. When you have completed your introduction, you would never say

That is the end of my introduction.

You should design a smooth transition statement that will lead you into the first part of your actual lesson. For example: If, during the introduction, you had listed the key points of the lesson, your transition statement could be:

If there are no other questions, let us begin with point number one.

Another example: Suppose your introduction ended with showing the product that the trainees will be able to produce after they learn the skill. A good transition statement could be

OK! In order to be able to produce this, we have to know a few definitions. Definition number one is...

Your trainees should never realize when the introduction is finished and when the main lesson begins--it should be a smooth transition.

Hints and Tips

1. Design the lesson introduction LAST. Design all other activities for the lesson before even thinking about the introduction.
2. Prepare the introduction in detail. Write out the first few sentences word by word.
3. Think about the learner's needs and interests.
4. Write questions that you will ask or may be asked.
5. Rehearse your introduction.
6. Keep the introduction relatively short (five to ten minutes are normally enough.)
7. Obtain feed back on the introduction by observing the behavior of your learners.
8. Involve the trainee in the introduction to the lesson through role-playing.

Conclusion

A lesson well begun is a lesson half-finished! The next time you plan a lesson introduction—Take a risk. Do something unusual or unexpected. Be creative. Surprise your learners. Be that actor you always wanted to be!

Go for it!!

PERFORMANCE GUIDE

Introduce a Lesson

Does the Introduction:	**Yes**	**No**
Gain the learner's attention and interest?	_____	_____
Instructor is enthusiastic		
Visuals or real objects used		
Challenging questions asked		
Appropriate humor or stories used		
Starting statements made		
Role-playing is used		
Questions are used		
A demonstration is used		
A handout is provided		
The final product is shown		
Provide for a review?	_____	_____
Link the lesson with the previous lesson		
Provide lesson objectives?	_____	_____
Clearly state the objectives		
Ask questions about the objectives		
Provide an overview and/or key points?	_____	_____
Describe activities that will follow		
Provide an advanced organizer		
State the key points of the lesson		
End with a smooth transition to the main lesson?	_____	_____

For a successful lesson introduction, all of the items should be checked "YES".

Give an Illustrated Talk

Introduction

An experiment was conducted in California. A college course was taught by both regular professors and professional actors who had been carefully briefed in the subject. The students did not know about the experiment. At the end of the term, the examination results were compared and the overwhelming evidence was that those instructed by actors had learned more than those taught by the subject experts.

Giving a lesson not only requires knowing which content to transmit but, also, how to transmit it. In other words, an effective lesson needs to be carefully prepared, structured and rehearsed before being presented in a dynamic, active manner.

Purpose

Illustrated Talk (IT) is an instructional method used in presenting knowledge using verbal and visual illustration. The knowledge presented may be facts, theories, principles or concepts. IT differs from a lecture which is a presentation of knowledge without using visual illustration.

IT is recommended when

- mainly dealing with abstract knowledge.
- introducing a subject or giving oral directions that will lead to other techniques that involve the learners activity.

IT is not recommended when

- dealing with learning that involves feelings of learners.
- the learner is required to integrate the material with previous learning or back-home experience.

Advantages

- uses the visual sense.
- the method is familiar to most audiences.
- it can be used with groups of almost any size.

Disadvantages

- it is a passive method for the learner.
- the learning effectiveness is low if limited to IT only.

Planning

Once you have decided that the most appropriate way of presenting your topic is the IT, consider the following preliminaries:

- **Identify your purpose**. Is your IT meant to inform, to persuade or to entertain. If you are not clear at this point, the IT you plan may not work.
- **Develop your enabling objectives**. Clearly identify what information, concepts, rules and principles need to be presented.
- **Analyze your audience**. Parameters such as age, level of understanding, expected prerequisites, knowledge, the social category of audience, may strongly influence the elaboration of the content, the wording, the choice of illustrations and the type of language to be adopted.
- **Brainstorm/Mindmap your skill or topic**. Get the best out of your topic (and of yourself). Consider your topic from various approaches, analyze its components, closely examine all possible points.
- **Plan your handouts**. Planning the broad content of your handouts, the degree of elaboration, their exact purpose, will help you design the main lines of your presentation and orient the selection of your illustrations, examples and visual aids.
- **Decide on duration**. But stick to one basic rule: **Limit straight IT to 20 minutes**.

The planning of your IT is not complete unless consideration has been given to:

- learners involvement;
- learners feed-back activities;
- learners' most probable questions.

They must be included in the preparation.

Structure

The basic concept of the IT is to emphasize a limited number of main ideas by repeating them:

> Tell them what you are going to tell them.
>
> Tell them.
>
> Tell them what you have told them.

These three sentences underline the structure of the IT:

1. Introduction
2. Main body
3. Conclusion

Introduction of the IT

You must **gain your audience's interest**. This can be achieved through various ways by:

- **An introductory exercise**: a game or a fun-filled activity.
- **A lead-off story or interesting visual**: a work-related anecdote, fictional story, cartoon or graphic.
- **An initial case problem**: a short problem around which the IT will be structured.
- **Questions:** ask oral questions related to the IT topic to motivate listening for getting answers.
- **A preview of the content:** highlights or "coming attractions" of the IT. Preview the main points you are going to develop.
- **Relating the topic to the audience**: people pay attention to things which affect them directly.
- **Arousing the curiosity of your audience**: a series of statements that progressively arouse curiosity about the subject.

The introduction should take 10 to 20 percent of the total duration of the IT. Plan a smooth transition into the next step.

Main body

With the main body of your IT,

you must convince your audience about the importance of acquiring and using the information presented. At the same time, you must help memorization by carefully **organizing** the information.

This can be done by applying the following principles to your development:

Select carefully 2 or 3 main points and arrange them strategically by selecting either:

- Chronological order (time pattern)
- Spatial order (direction pattern)
- Causal order (cause-effect relationship)
- Problem solution order (existence of a problem and of a workable solution)
- Topical order (divide into subtopics which become main points).

- **Keep main points separate** and clearly independent of each other.
- **Balance the amount of time** devoted to each main point.
- **Use the same pattern of wording** for all main points wherever possible.

Example:

Ineffective

I. Regular exercise increases...
II. Your sleeping pattern is improved by regular exercise.

Effective

I. Regular exercise increases...
II. Regular exercise improves your sleeping pattern.

Conclusion of the IT

You have convinced your audience with the main body. But your goal is not achieved if you fail to **have your audience remember** your main points.

First of all, avoid an abrupt termination:

- **Prepare** your audience by giving them a signal for the coming end.

Then, "hammer the nail in":

- **Reinforce** the central idea

- by summarizing your main points
- by referring to the introduction.

- **Mark the full stop** with either:

- a quotation
- a "dramatic" statement.

The conclusion should take 5 to 10 % of the total time of the IT.

Illustration

Let us concentrate now on how to support your message with both verbal and visual illustrations.

Verbal illustrations.

Most commonly used verbal illustrations are:

- analogies (make similarities appear between known and unknown)
- frames of reference (create links with previous knowledge)
- anecdotes (illustrate your topic with an amusing or interesting related story)

Visual illustrations.

Your visuals are meant to reinforce your presentation, not to confuse it.

After selecting them, be critical about their use. Too many, or not appropriate ones, may negatively affect your IT.

Among the variety of visual aids, most commonly used to illustrate an IT are models, photographs, charts, drawings, transparencies, graphs, chalkboard, slides, video tapes, computer generated graphics, without forgetting the body language of the speaker. For proper use, refer to the respective Skill Cards.

Conclusion

Delivering an Illustrated Talk is an art. But, renowned artists admit that art is 95 percent of work and 5 percent of genius. We can hope for genius but we cannot escape preparation. Let's make sure we have exhausted the planning and preparing phase before meeting the audience.

Performance Guide

Give an Illustrated Talk

Has the instructor:		**Yes**	**No**
1.	stated a clear purpose to the IT?	___	___
2.	developed the objectives?	___	___
3.	analyzed the audience?	___	___
4.	brainstormed/mindmapped the topic?	___	___
5.	prepared the handouts?	___	___
6.	prepared examples and visual aids?	___	___
7.	incorporated main ideas, preview and review statements?	___	___
8.	structured the introduction?	___	___
9.	developed a strong conclusion?	___	___
10.	rehearsed with visuals?	___	___
11.	checked on total duration not longer than 20 minutes?	___	___
12.	planned for participants' involvement and feedback?	___	___
13.	prepared answers to most probable questions?	___	___

For a through planning of the Illustrated Talk, each step must be checked "yes".

Demonstrate a Skill

Introduction

A demonstration may be defined as a visual explanation of important facts, ideas or processes. It is a powerful teaching method where the instructor actually shows or "**demonstrates**" how to perform a skill (e.g. how to operate a machine or use a tool, how to sterilize surgical instruments, how to change a typewriter ribbon). It involves the use of the learner's senses of sight hearing and sometimes smell, touch or taste. A demonstration forms a bridge between theory and practice. A demonstration is usually followed by practical applications of the skill.

Purpose

A demonstration is an appropriate method for teaching a skill. A good demonstration will:

- show clearly how the skill is performed
- highlight critical steps and safety concerns
- allow learners the opportunity to ask questions before they begin their practice.

Procedure

A demonstration should generally consist of two basic steps: planning and preparation followed by the actual presentation.

Planning and preparation

Planning and preparation are essential parts of an effective demonstration. Following are the key points of planning and preparing:

- Develop a performance guide to be given as a handout. A separate Skill Card is available.
- Arrange the physical environment.
- Collect all tools, equipment, supplies and visuals and make sure that these items are in good condition and properly organized.
- If there are any time consuming steps (e.g. paint to dry, dough to rise) prepare a sample before the demonstration. At the appropriate point, the instructor may explain "In actual practice, this paint would normally take 20 minutes to dry before we would proceed on to the next step."
- Have teaching aids nearby. Know exactly when they are to be used and how to use them (transparencies, models, real objects etc.)
- Practice the demonstration, especially the first few times you give it.

Presentation

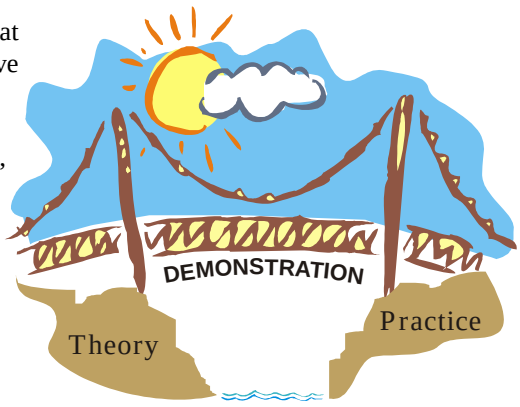
Good planning is only half of a good demonstration. A demonstration is effective only if you deliver it well. While demonstrating a skill, keep these guidelines in mind:

- Tell learners exactly what will be demonstrated. Give an overview of the entire demonstration at the beginning. Use a picture, model, or real object to show the finished product
- Link the skill to previous and future skills
- Distribute and explain the performance guide to each of the learners
- Arrange proper seating so that everybody can see and hear
- Demonstrate the steps slowly. If your demonstration is fast, someone may miss some of the steps
- Show only one procedure at a time—the one in your performance guide. The procedure should be the best or most common way to correctly perform the skill. Don't confuse learners by showing several procedures or incorrect methods
- Keep the steps in their proper sequence
- Emphasize critical steps and safety check points
- Pause at key points, and ask questions to make sure learners are following
- After giving the demonstration, have a learner repeat the skill while you explain the steps
- Ask summarizing questions such as:

  "What are the critical points to remember?"

  "What is the purpose of this skill?"

  "Which are the steps critical to the product?"
- If needed, repeat all or parts of the demonstration.



Sometimes, you should give the demonstration two or more times. The first time saying aloud the steps as you demonstrate them slowly. Follow this by the second demonstration where you ask questions.

After the demonstration

- A learner will repeat the demonstration guided by the instructor.
- Another learner will repeat, assisted by somebody using the checklist.
- The learners practice until they can perform according to the given criteria.

Hints and Tips

- While demonstrating the skill, maintain eye contact with the learners and do not just talk to the equipment.
- Use visuals to clarify complicated steps. Wall charts are very useful for demonstrations in workshops. They remain on the wall during practice time.
- When demonstrating with your hands, indicating directions (left or right) or showing clockwise or counter-clockwise rotation, make sure that your learners understand accordingly.
- Involve your learners in the demonstration with questions such as:

  "What should I do next?'

  "Why is it necessary to do it this way?"

  "What happens if I do this in the another way?"
- If the materials your learners are using to practice with will not be available when they go back to their jobs, ask what other materials can be used to do this skill.

Conclusion

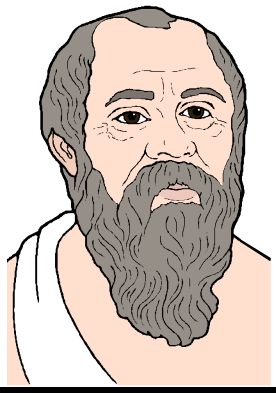
A demonstration can be made interesting and effective through careful planning and preparation. Ask and encourage questions. Repeat critical steps. Point out safety precautions. Take the demonstration seriously. After your demonstration, your learners should be ready for guided practice.

Performance Guide
Demonstrate a Skill

Did the instructor:	**YES**	**NO**
Before the Demonstration		
1. Arrange the physical environment?	_____	_____
2. Collect all tools, equipment, supplies and visuals?	_____	_____
3. Develop a performance guide?	_____	_____
4. Have instructional aids nearby?	_____	_____
5. Practice the demonstration?	_____	_____
During the Demonstration		
6. State the skill to be demonstrated?	_____	_____
7. Distribute performance guide?	_____	_____
8. Link the skill to previous skills?	_____	_____
9. Make sure all can hear and see?	_____	_____
10. Talk to the learners not to the equipment?	_____	_____
11. Demonstrate steps slowly?	_____	_____
12. Show only one procedure at a time?	_____	_____
13. Keep steps demonstrated in a proper sequence?	_____	_____
14. Use visuals to clarify complicated steps?	_____	_____
15. Emphasize safety checkpoints and critical points?	_____	_____
16. Involve learners by asking them summarizing questions?	_____	_____
17. Repeat all or parts of the demonstration if needed?	_____	_____

For a good demonstration, all steps should be checked "YES."

Use Oral Questioning



Introduction

A class without dialogue is a dead class. To initiate a discussion, to provoke critical thinking, to check which message has reached the trainee, the instructor asks questions. Oral questioning is an effective teaching technique. Applied properly, it contributes fundamentally to the learning process.

Asking good questions is not easy. The purpose of this Skill Card is to discuss how to formulate good questions and how to react to trainees' responses.

Purposes

The instructor asks questions to:

- Involve learners;
- Assess the knowledge of the learner and get evidence of what they have learned;
- Challenge existing ideas;
- Identify learners having difficulty;
- Ensure complete understanding of the subject matter.

Types of questions

The two most common types of questions are:

Closed questions

Closed questions are restrictive--only a "yes" or "no" or one very short answer is required. Examples are:

Can you weld?

What is the capital of France?

Closed questions are useful for starting questioning exercise.

Open questions

Open questions are thought provoking and challenging. They allow different answers. Examples are:

Why is wool warmer than cotton?

Why does a hard disk give faster access than a floppy disk?

Open questions normally begin with "What?" "Why?" "When?" "How?" "Where?" and "Which?"

Thinking activities

Questions stimulate different types of mental activities, such as:

Completing-*Today, our lesson will be on _____?*

Defining--*What is the definition of brainstorming?*

Listing--*Name all of the steps in doing this skill.*

Observing--*Tell me how many safety violations you see here.*

Reciting--*What is our famous quote from William Blank?*

Selecting--*Which of these tools is a vise grip plier?*

Analyzing--*What is the most critical part of this process?*

Comparing--*What does this skill have in common with the one we learned yesterday?*

Explaining--*Why do the angles not add up to 180 degrees?*

Organizing--*How could you arrange this information better?*

Sequencing--*In what order should these steps be performed?*

Applying--*What would happen if we used kerosene instead of fuel oil?*

Examples--*State other examples where this same technique would work?*

Forecasting--*Based on last year's production, how much profit will we make this year?*

Generalizing--*Now that you have passed this course, how will you make use of your new skills?*

Judging--*Which procedure works the best?*

Preparing questions

In addition, experienced teachers prepare their questions ahead of time.

- Be clear about the objective of your questioning.
- Ask a question only if you are interested in the answer.
- Check if trainees have *enough experience* and *previous knowledge* to give reasonable answers.
- Formulate the questions word by word and in writing.
- Use simple language.

Questioning procedure

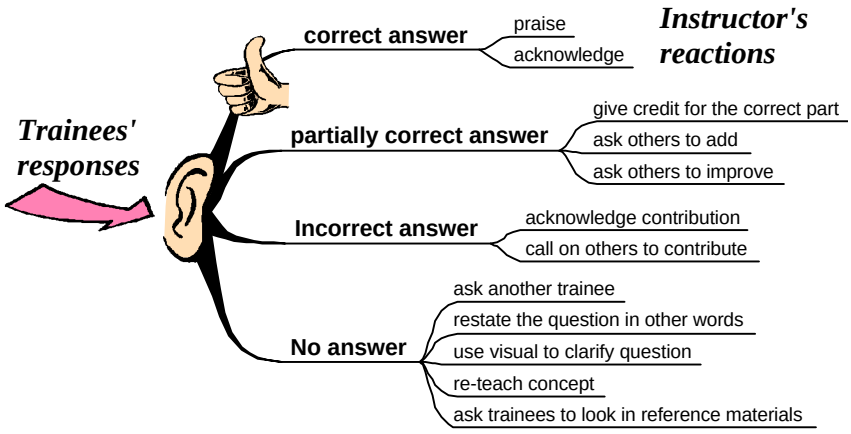
Sequence of oral questioning

Start with closed and easy questions and continue with open, abstract ones.

1. Ask a question to the whole class.
2. Wait for at least 3 seconds.
3. Make sure that everybody has understood the question. (Observe trainees' reaction.)
4. Wait for a few more seconds.
5. Address the same question to a specific trainee.
6. Search for consensus on the correct answer.

Handling trainees' responses

The most important thing to do is to *listen* to the answer. Look on the back of this Skill Card at the graphic showing four possibilities and the reactions of the instructor.



Handling trainees' questions

In a good questioning exercise, it is normal that trainees come up with questions, too.

Usually instructors are tempted to respond themselves. A good way to stimulate participation is to give fellow learners a chance to answer.

Note:: No one is required to know everything. Do NOT give vague or even wrong answers. You only can gain credibility if you promise the students to search for the right answer - and then deliver it as soon as possible!

Probing

Probing is the technique for "digging" into the learners mind to see what is actually there!

Effective techniques are:

Silence--Allow the learner time to think and possibly tell you more.

Encouragement--*Please go on...*

Elaboration--*Tell me more...*

Clarification--*What do you mean by...*

Challenge--*But if that were true, what would...*

Evidence--*What proof do you have that...*

Relevance--*Yes, but how does it apply here...*

Examples--*Can you give me an actual example of this...*

Hints and Tips

- Use simple language and vocabulary.
- Make sure that you are asking only one question at a time.
- Prepare questions in advance.
- Pose questions where different answers are possible.
- Encourage further explanation.
- Allow time for the learner to think and respond.
- Listen--listen--listen.

Precautions

- Small groups or individual trainees can dominate the discussion. Provide every learner with equal opportunities for answering.
- Shy, quite and/or weak trainees are reluctant to participate. Call on learners by name—do not allow the same learners to dominate.

Conclusion

Socrates (469 - 399), a Greek philosopher and one of the fathers of the art of questioning, used this method for one purpose: to make people think sharply.

Asking good questions is a challenging and worthwhile activity, both for the trainees as well as for the instructor!

Performance Guide

Use Oral Questioning

Did the Instructor:

1. Prepare questions prior to class?
2. Formulate questions using simple words?
3. Ask only one question at a time?
4. Ask primarily open questions?
5. Pause 3 seconds after asking question?
6. Respond properly to correct answers?
7. Ask for clarification when needed?
8. Encourage further explanation through probing?
9. Respond properly to partially correct answers?
10. Respond properly to incorrect answers?
11. Respond properly when there is no answer?

For effective oral questioning, all steps should be checked „YES.“

Give and Receive Feedback

Introduction

Instructors are communicators. They perform in front of small and large audiences. It is important for the instructor's development to know how he/she is perceived by others. One way to improve personal behaviour and performance is by receiving information - feedback - from the audience. Feedback is not criticism, especially not negative criticism. It has its own rules. To avoid bad feelings, anger or frustration, both the person who gives feedback as well as the person who receives it must follow them.

Feedback

Feedback consists of individual comments about the performance or behaviour of somebody. Feedback is not information about who somebody is, it is information about how somebody's behaviour and performance is perceived by others. Negative comments are neither encouraging nor do they help the performer in changing his/her performance. Feedback is effective only if suggestions and proposals for changing are given. This is a challenge for the giver of the feedback.

Affirmative Feedback

- acknowledgements (thanks for your input...)
- positive comments (good job, we can see that you worked hard; well done, this is an excellent chart; your message is clear...)
- mentioning the good points (I can read your letters easily; you have used the colours sytematically; your presentation is structured...)

Developmental Feedback

- suggestions for improvement (if you will increase the size of your letters they will be much easier to read; use the available space; shift the whole to the center; change the volume of your voice; ask one question at a time...)
- recommendations (the learners could give the answer in writting; groupwork would be an appropriate method; the information could be given on a handout...)
- During feedback two parties are involved: the receiver and the sender(s). While the sender is asked to make observations, the receiver is supposed to listen only. He/she asks questions if the message is not clearly understood.

Receiving Developmental Feedback

In her studies with persons who were informed about their incurable disease (cancer), Kubler-Ross identified the following chain of reactions and feelings after the individuals received the message (feedback):

Denial
↓
Anger
↓
Rationalisation
↓
Acceptance
↓
Renewed Action

The aim of the following guidelines is that the receiver starts with the rationalization of the received information and not with denial or anger.

Guidelines for Giving Feedback

- be clear about what you want to say in advance
- start with the positive (most people need encouragement)
- be specific (avoid general comments)
- refer to performance that can be changed (people can change their posture but not their height)
- allow freedom to change or not to change
- offer alternatives (negative feedback is ok, but only if suggestions are given)
- be descriptive rather than evaluative (tell what you have seen, don't tell what was 'good' or 'bad')
- 'own' the feedback (begin the feedback with "I" or "in my opinion")
- give the feedback as soon as you can

Don't forget: Feedback is also telling about what the giver's values are!

Guidelines for Receiving Feedback

- listen to the feedback rather than immediately rejecting or arguing with it
- make sure that you understood the feedback
- don't rely on one source (an individual opinion is not always shared by everybody)
- ask for feedback that you want but don't receive
- decide what you will do as a result of the feedback

The Amount of Feedback

Too much feedback can confuse the receiver. You have to deceide about the 'right' amount. Sometimes little is needed sometimes more. The actual situation will tell you what the appropriate and meaningful amount of feedback should be.

CHECKLIST FOR THE SENDER

DOs

- look at the receiver
- consider the feelings of the receiver
- give the receiver a chance to ask
- vary the tone and the speed at which you speak so that your voice is interesting to listen to
- speak clearly
- respect your receiver

DON'Ts

- don't complicate what you are saying
- don't ridicule or attack your receiver
- don't pretend or exaggerate
- if feedback makes only you feel better, don't give it

AMOUNT	EFFECT
None	no correction, no change, no improvement
Too much	breakdown, fear, afraid of making mistakes
Too little	development could go in a wrong direction
Only negative	loss of confidence, loss of motivation, frustration
Only positive	gives the impression that everything is ok and perfect, no option for varieties

Above all, try to:

CATCH PEOPLE DOING THINGS RIGHT!

This is the best way to motivate learners to improve their performance.

Feedback Criteria

Feedback should be:
specific
right amount
not too much, not too little
not only negative, not only positive
A mixture makes the soup smell well. If the soup is tasty it's easy to swallow.

Conduct a Debriefing

Introduction

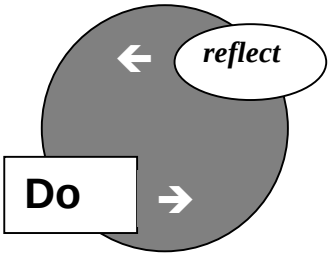
According to Kolb (1984):

"Learning is the process whereby knowledge is created through the transformation of experience."

In other words, we learn by seeing and doing things which we think about afterwards. If we omit this "afterwards" step, a strong argument can be made that little actual learning has taken place. In training today there is an increasing emphasis on experiential learning (learning based on experiences) such as role-play, dramas, simulations, games, case studies, projects, work experiences, and discovery learning, all allow the learner to become actively involved in the teaching-learning process. The important point here is that:

Experience, however, is not what happens to you. It is what you do with what happens to you.

Experiential Learning



Activities alone are of little value. Reflect on them, and they become ***experience****.*

Reflecting on what has happened in a training activity provides the crucial link between the activity and the process of change or learning. Reflecting is assisted by exchange of the experience with others who have shared the experience. This process of reflecting and discussing shared experiences is called **debriefing**.

Purpose

At the end of any experiential activity, each participant has formed many ideas and feelings about "what happened." The purpose of a debriefing is to return to the activity and clarify together what happened. Only by carefully sharing their observations and feelings can the trainees fully learn from the experience. Misunderstandings and mistakes can be corrected.

The debriefing can focus on:

- the activity - what has happened and what have we learned?
- the instruction - how was learning structured and how could it be improved?

A well conducted debriefing session will encourage learners to make and share observations about individual and group behavior: skills that are very important on the job as well as in family life.

Phases

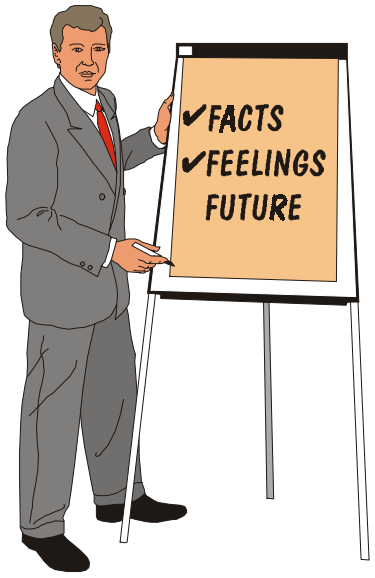
Most instructors, when finished with an experiential learning activity, say something like, *Well, that's it. Let's talk about it for a few minutes.* The end result is that little learning takes place.

A properly planned debriefing takes on the following three phases:

Phase I - Facts

After the activity, "what happened," should be analyzed to separate fact from opinion and feelings. This phase is descriptive in nature. To help in this process:

- Ask the participants in the activity for their reactions or experiences to the activity.
- Ask observers of the activity for their observations.
- Agree on what happened (based on the facts).



Phase II - Feelings

The group reflects on why certain individuals acted or felt the way they did. It can also be a good time to ask "What would be the outcome of the same situation if one individual acted in a different manner?" During Phase II, the instructor should help the group:

- Analyze causes of behavior
- Draw conclusions about the way people behave
- Decide what can be done to improve the situation
- Re-run the modified activity

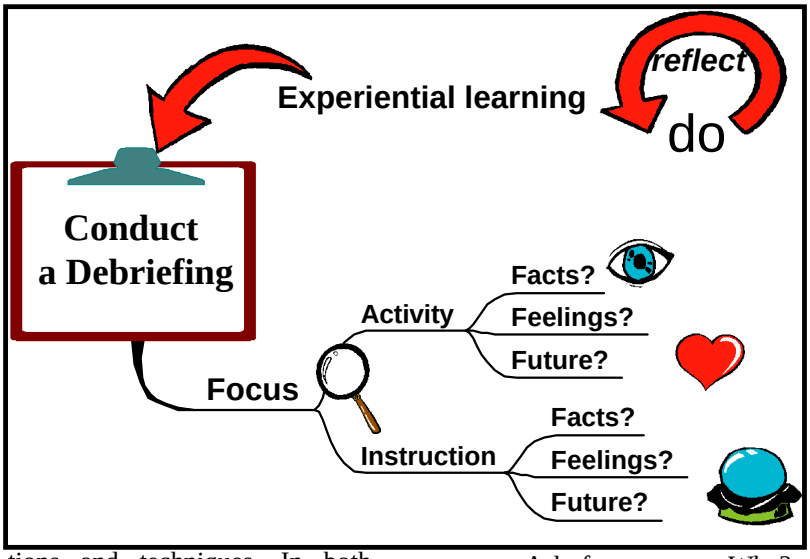
Phase III - Future

After any learning activity, the question should always be, "How can I, the learner, put to practical use what I have learned during the activity?" Learners should be encouraged to develop their own plans to incorporate the new information into their work in the future. To assist with this process, the instructor should:

- Draw general conclusions from the activity
- Help relate the activity to actual work situations
- Provide time for the learners to plan follow-up actions

Techniques

Depending on the focus (activity or instruction) the instructor work should work with different ques-



tions and techniques. In both cases he/she must carefully distinguish between the three phases.

Debriefing the activity

During Phase I

- Use open ended questions. How? What? How many? How often? Who?
- Insist on descriptive, not evaluative comments.
- Concentrate on individual players.
- Respect feelings.
- Only allow individuals to comment on their own experience--not someone else's.
- Do not evaluate quality of performance.
- Do not argue about misunderstood instructions.
- Do not make judgments about attitudes.
- Use role titles in discussions, not the individual's name.

Hint: Observation sheets that are used by a group of observers during the experiential activity, often deliver a lot of data and allow surprising insights.

During Phase II

- Ask for feelings. "How did you feel about what happened?
- Ask for reasons. Why? How? Who?
- Probe answers. Why not? What if?
- Seek alternative theories and other possible explanations.
- Collect other examples. Where has this happened before?
- Give views of outside experts.

During Phase III

- Get learners to commit themselves to action.
- Insist that they should commit to only a few, but do-able actions.
- Write actions on wall posters.
- Organize learners into action groups.
- Put a time scale on actions.
- Agree on criteria for success.

Debriefing the instruction

To improve your instruction it is necessary to look back on how the learning took place. This process of reflecting models a valuable lifelong tool for your learners.

During Phase I

- What happened?
- How was the learning process structured?

During Phase II

- How did you feel about it?
- What was helpful? What was hindering? Why?
- How would it have been, IF we had .....?

During Phase III

- How could instruction be improved next time? (activities, sequence, time allowed, ...)

Conclusion

As a general rule, the time allowed for debriefing should not be less than that allowed for the activity itself. Many experts go further and say to allow 50% more time for the debriefing than for the activity. Remember--a good debriefing makes sure that your experiential learning activity ends with meaningful learning.

Conduct a Debriefing
Performance Guide

Did the Instructor:

For the Debriefing:

1. Allow sufficient time for the debriefing?
2. Arrange the room for discussion?

For the Activity:

3. Lead the group in establishing the facts?
4. Lead the group is communicating their feelings?
5. Lead the group in planning for the future?

For the Instruction:

1. Lead the group in a review of all instruction?
2. Lead the group in communicating their feelings about the instruction?
3. Lead the group in discussing how the instruction could be improved?

For a successful debriefing, all steps should be marked "Yes."

Manage Small Group Activities

Introduction

The director of a training center asks a trainer who is late for work: *Are you prepared today or are you going to do group work again?*

This joke reflects a typical misunderstanding about group work. Methods such as role-playing, brainstorming, dramas, games, simulations are highly effective. They require careful planning and managing. Using these activities without planning makes a joke of your instruction.

Purpose

Teaching in small groups is commonly used for two different reasons: a social and an educational reason. Group work provides chances for social contact among peers. It helps develop interpersonal skills like listening, speaking, arguing and leadership. Group teaching is educationally useful for developing higher-level intellectual skills such as reasoning and problem solving.

Group work makes sense when:

- the assignment is within the range of the experience level of the student
- several opinions and experiences can contribute to a result
- the assignment is stimulating or challenging
- the purpose is clearly defined

Group activities encourag the independence of the students' learning. This independence is important for students coming from teacher-centered schools.

Managing

The Performance Guide provided on the back of this Skill Card should be used to plan and manage your small group activities.

The assignment

A clearly defined assignment is the cornerstone of any group work, because it helps to create a calm and positive climate. First, the instructor must be clear about what he/she wants to accomplish with the activity. Second, provide the task in a written form on an assignment sheet or written on the board or a chart. The assignment must include all of the information needed for the groups to function smoothly with a minimum of questions. The groups can work on the same or different assignments.

Group size

The rule of the smallest group size:

A group should big enough, to provide enough resources to solve the assigned problem, but not too big that some resources are not used.

That means that the ideal size of a group cannot be generally defined, but depends on the task and the methodological competence of a group. Practice shows that groups of 4 to 7 members work well.

Define, along with the size, the number of groups. Since groups usually report their results to the whole class, plan the reporting time accordingly. The more groups you have, the longer the reporting procedure will last unless alternative forms to oral reporting are employed.

Forming groups

Forming groups can be done in different ways:

A. Randomly:

counting, table rows, drawing cards or numbers, etc.

B. By interest:

Different tasks are formulated and students are can choose which task they prefer.

C. By friendship or neighbors:

Students are allowed to form the groups themselves, before the tasks are given

D. Logically:

Students are divided using some logical pattern such as by trade groups or men vs. women.

Because of the easy procedure, **short-term working groups,** which change very often, are usually formed randomly.

Long-term working groups should be carefully selected, taking into account interests as well as personal friendships. In the initial phase, cooperation problems within the group might indicate that the composition should be changed.

Group work and reporting

While the groups are working, the instructor tries to interfere as less as possible. When time is over and the groups have finished their work, facilitate the reporting of the groups. Make sure that all groups are heard and noted.

Debriefing

The last but a most important step is the debriefing (a separate Skill Card is available). The group discusses what happened, how they feel about it and what could be improved the next time?

Conclusion

Group activities are powerful methods for allowing students to participate in the teaching-learning process. They stimulate social behavior and higher-level thinking. To be effective however, group work requires a well thought out, meaningful assignment as well as proper planning and management techniques.

Performance Guide **Lesson:**_____

Manage Small Group Activities

Date: _____

Planning

Type of group activity (Check one):

___ Brainstorming	___ Skill practice	___ Case study
___ Role-play	___ Simulations	___ Game
___ Drama	___ Task or focus groups	___ Project
___ Work experience	___	___

Purpose of the activity:

• **Why** are you doing it? • What do you want your learners to **accomplish**? • What **results** are expected? • What will be **learned**?	

Group formation

• How many groups? • Size of the group (4-7)? • How to form them? (random, interest, friendship, topic)	

Time required

To prepare the groups	To actually work in the group	To report back	To debrief the activity	**Total**

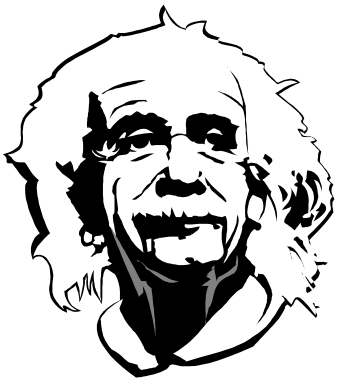
Implementing

Procedure

1. State the purpose of the activity.
2. Give an overview of the complete activity.
3. State the questions, issues or problems that will be addressed. Will the same or <u>different</u> questions, issues or problems be given to each group? Use the **back** of this form for group assignments.
4. Divide the groups:
5. Provide logistical information:
   - Where - rooms or areas for each group?
   - When - how much time will be allowed?
   - What - products are expected?
   - Who - will lead the group? What will be the group structure?
   - How - will the group proceed?
   - Resources - what materials or supplies does each group need?
6. Ask for any final questions.
7. GO! (Tell the groups to get to work.)
8. Monitor the group progress - adjust the time if necessary - resolve any conflicts.
9. Call time.
10. Facilitate the group reports.
11. Conduct the debriefing activities

Attach this sheet to your lesson plan!

Use Brainstorming



Introduction

Brainstorming activities are a great way to "get a lesson going." The process actively involves your students in a creative and active thinking activity. Not only are the techniques useful in the classroom, your students should be able to use the techniques on the job when faced with a problem.

Purpose

Brainstorming is a technique used to generate many fresh ideas about a topic or problem. It stimulates involvement, interest and creative thought.

The purpose of brainstorming, however, is NOT to solve a problem.

Requirements

Use brainstorming with groups whose experience and background are related to the topic or ideas you wish to generate.

Brainstorming works best with group sizes of 10 to 20 people. In larger groups, not everyone will have the opportunity to participate. If your group size is larger than 20, break into smaller groups, do the brainstorming with each group, and then combine the groups for discussion.

The session requires a leader to direct the activity, one or two recorders to capture the comments of the group, a chalkboard, a pin board or a flip chart for recording the comments.

Rule

Brainstorming works on the *principle of postponed judgement.* Many people start criticizing ideas even before they are spelled out completely. As brainstorming aims at generating ideas, there is a single most important rule for conducting brainstorming activities:

1. ***Evaluation and criticism are NOT allowed during the activity.***

Other rules are:

2. *Quantity is more important than quality.* Often a bad idea is the father of several good ones.
3. *Unusual ideas are highly welcomed.* Even those that sound crazy or impossible are recorded.
4. *Hitchhike on the ideas of others.* There is no individual copyright. Brainstorming is a group effort.

ALL ideas related to the topic are recorded. Evaluation activities come later after many good and even unique ideas are generated.

Procedure

1. Select the leader and the recorder (s).

The leader may be the instructor or may be selected from the group. The recorder is normally selected from the group.

2. Identify a specific topic or problem to be addressed.

The topic must be understood by all. The participants must have enough knowledge and experience to deal with the topic.

The topic should be as specific as possible. Normally, formulate the topic as a question. It must be challenging, open and at the same time well focussed

Following are some good examples for brainstorming questions:

- *How can we generate more production income?*
- *What shall we do for a social event this year?*

Following are a few bad examples for brainstorming:

- *Agriculture in Nepal*. (Much too broad a subject.)
- *How to cure AIDS*? (There is no cure now. Your group probably would not have the knowledge for this discussion.)

Write the question or problem clearly on the board for all to see.

3. Orient the participants to the brainstorming technique. If you have never used this technique before with the group, explain the purpose and rules for brainstorming.

4. Call for input--record the responses. Now is the time to open the door to the comments from the group. Make sure the recorder is prepared and that each comment is recorded for all to see.

5. As a leader, guide, not dominate. Stay in the background as much as possible. When the ideas taper off, try to get the ball rolling again. Make sure that negative comments do not enter into the session. Try to get all of the participants involved, not just a few "talkers."

6. Close the session. After a set time, or when the ideas have stopped coming, stop the session and call for a report from the recorder(s).

7. Report. The recorder should give a report on the ideas generated. This report can be given orally at the end of the session or later, in writing. The important thing here is NOT to discard the group ideas.

After brainstorming

Brainstorming is usually just the beginning of a process.

The next activity could be to group similar ideas. This is especially easy when you use flash cards and pin boards. Move the cards that belong together and add headings to the different clusters

At some point these ideas will have to be evaluated and possibly a "best" idea or solution selected. Techniques such as "multi-voting" and "Nominal Group Technique" can be very helpful with this process.

To use multi-voting, give participants a marker and have them place three to five marks (votes) besides the ideas they favor. Discuss the ideas with the most votes.

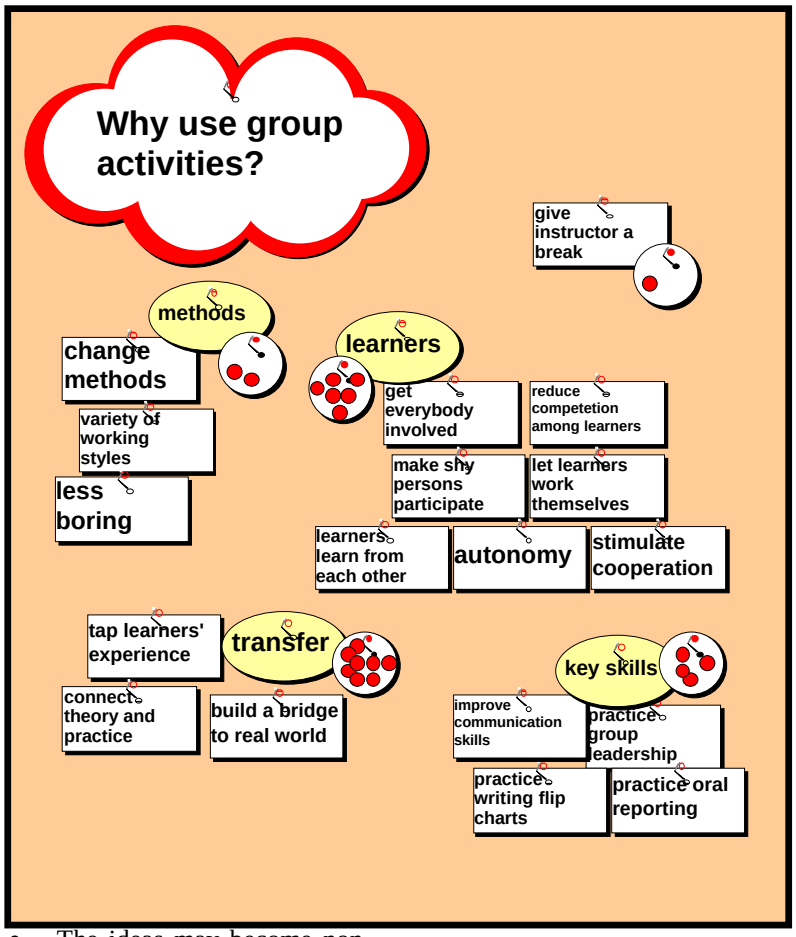
The leader may wish to collect more information on each idea to help later with decision making.

Advantages

- Brainstorming is a very active preplanning technique.
- Brainstorming involves the group in creative thinking.
- No evaluation is allowed, therefore, everyone's comments are valuable.
- *You can also do brainstorming alone, although it is less productive, because the ideas of others are missing. Experienced "brainstormers" generate many good ideas.*

Disadvantages

- Productivity may be questionable at times. Orient the group properly and make sure they have the knowledge and interest to deal with the topic.
- Some students may try to dominate the activity. Make an effort to obtain participation from the entire group.



- The ideas may become nonsense. Select the topic carefully. Make sure that it is very specific and challenging.

Conclusion

Brainstorming is one of the most useful methods for generating a great deal of interest in a topic or question. Most individuals like the technique because it is non-threatening: all responses, no matter how unusual, are accepted equally.

Performance Guide

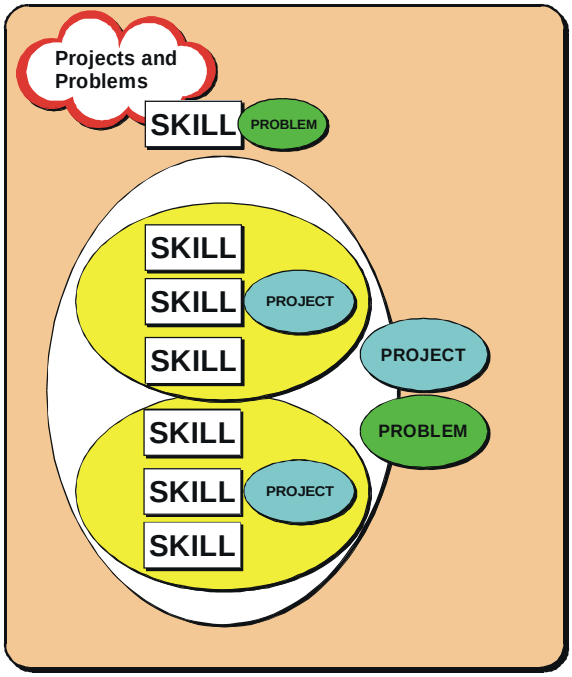
Use Brainstorming

Use the following criteria to rate a brainstorming session:

1. Was a leader and recorder selected?
2. Was a specific topic or problem stated clearly and placed before the group?
3. Was the group oriented to the brainstorming technique?
4. Were ALL of the group responses recorded without evaluation or criticism?
5. Did most of the group participate?
6. Was a report given back to the group?
7. Were follow-up activities such as multi-voting conducted?

For successful brainstorming sessions, your response to all questions should be "YES."

Assign Projects & Problems



Introduction

In many training programs, the *magic* element is missing. In these programs, the instruction stops after each individual skill in the curriculum has been taught. Students graduate from such programs, competent in skill performance yet missing the *magic* element.

What is this *magic* element? It is the challenge and opportunity for the learner to apply the skills that have been learned--to apply them in real world situations and under real world conditions.

What is this *magic* element? It is the challenge and opportunity to work with other learners in a team—first as a contributing member, then later as a team leader. Without such application, learning is not complete.

What is this *magic* element? It is the challenge and opportunity to look back on what has been learned and select skills and concepts, even having to modify them at times, to solve real world problems.

What is this *magic* element? It is quite simple. The *magic* element is nothing more than carefully designed projects and problems given to the learner at the appropriate time.

When is this appropriate time? Read the Concept Card, *A Spiral Journey: Effective Occupational Training* to find out the answer.

Definitions

Project: A structured experience, given to a learner or group of learners, which requires specific occupational skills to be applied combined with cognitive skills such as creativity, planning, decision making, estimating, and communicating.

Examples:

Plant a vegetable garden

Build a storage barn

Install a sink

Build a solar heater

Examine a patient

Build a short-wave radio

Rebuild an engine

Design a house

Projects typically require the learner to apply many related individual skills. Of course, the focus is on doing!

Problem: A challenge provided to a learner or group of learners which requires the application of specific occupational skills, combined with cognitive skills such as trouble-shooting, problem-solving, research, and brainstorming.

Examples:

Can you fix my radio?

My stomach is hurting. Can you help?

What happened to my maize crop?

Why is the engine making a funny noise?

My coat is torn. Can you fix it?

Why is the wall cracked?

Notice that problems have a very "real world" sound to them.

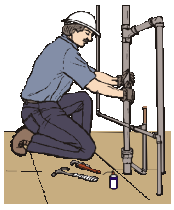
Many of the problems above are quite complex and require the application of many specific skills.

Give problems that apply to only a single occupational skill.

Example:

Now that you have learned to repair a brake cylinder, what would you do if you could not find a repair kit?

Any time you ask the learner what he or she would do "IF" something unusual occurred, you are presenting a problem. The trick here is not to just ask, but go ahead and require the learner to perform the skill under those unusual conditions.



Purpose

Projects and problems allow our learners to:

- apply individual skills to real-world situations
- improve cognitive skills
- improve interpersonal skills
- improve communications skills
- strengthen self-responsibility and self-esteem.

Advantages

Projects and problems:

- being indirect in nature, contribute more toward long-term learning
- are more interesting and exciting than direct instruction
- allow the learner "hands-on" experiences with materials and equipment.

Disadvantages

Projects and problems:

- require time to develop
- require materials and supplies
- may not come out as expected thereby wasting both time and resources.

Development

Table 1 illustrates how projects and problems are developed over time. In the early phases of training, projects and problems given are quite simple. Learners take the individual skills they have learned and apply them directly. The new learner either works alone or as a member of a team. Such activities promote near transfer of learning. This means that the learner will be able to do very similar projects or problems when faced with the same conditions on the job.

Toward the end of the time in the training, projects and problems become quite complex—ideally, like those encountered on the actual job. Learners are required to look at the project or problem carefully, select the skills to be used, possibly modify the procedures for the skills, and function as a team leader. Such learning promotes far transfer. The learner will be able to adapt his/her learning to many new and unusual situations on the job. This is exactly the type of graduate that business and industry are looking for.

Table 1

Projects and Problems

Time in training	Beginning → End		
Learner role	Team member		Team leader
Difficulty	Simple		Complex
Skill usage	Direct application of skills	Selection of skills	Selection and modification of skills
Learning transfer	Near transfer		Far Transfer

Who designs?

While the instructor usually presents most problems, the learners themselves can design effective projects. In fact, assigning a group of learners to design a project presents them with a challenging problem!

Procedure

Select projects and problems that are similar to those encountered on the job. Make sure your assignment will fit within your curriculum and budget constraints.

Involve learners wherever possible, unless you are simply providing them with a problem.

Allow adequate time for your teams to plan, estimate, generate ideas, discuss and decide what to do. Each team should prepare a budget and time schedule.

Obtain learner input into how the activity should be evaluated. This will focus their attention on the most critical parts of the assignment.

During the implementation phase, monitor the work closely, yet do not take control. You must allow that some mistakes will be made.

Finally, evaluate according to the agreed upon criteria and debrief the activity with the learners.

Conclusion

Any time you plan skill-based instruction—either one lesson or a complete training program—do your learners a big favor—include the *MAGIC*!

Performance Guide

Assign Projects or Problems

Did the instructor (and/or the students):

1. Propose Projects/Problems (P/P) similar to a real job?
2. Involve learners in selecting the P/P?
3. Insure that P/P fit within curriculum and budget?
4. Allow enough time for planning the P/P?
5. Approve the budget and time schedule for each P/P?
6. Obtain learner input on evaluation criteria?
7. Monitor without taking control?
8. Evaluate according to the criteria?
9. Debrief the activity?

For successful projects and problems, all questions should be answered "Yes".

Assign Homework

Introduction

Assigning homework is one of the most common forms of student activities. It is an excellent way to continue the learning process outside of the classroom. Homework may consist of problems to be solved, reading to be done, papers to be written, questions to be answered, projects to be carried out, or practice to be performed.

Purpose

Homework is assigned to:

- improve the reading, writing and study skills of the learner;
- place more of the responsibility for learning on the learner;
- save class time by having the learners come prepared to discuss the topic or issues;
- provide the instructor with feedback on each individual learner;
- give slower learners more time to complete assignments.

Limitations

Homework will not be effective if it is not checked. Homework should be taken up at the assigned time, checked and returned as soon as possible to provide the learner with immediate feedback.

There is no guarantee that the learners don't copy from their friends, or directly from reference materials. The instructor should be aware of these possible limitations.

Types of assignments

There are many types of homework assignments. A few are:

1. **Problem assignments**: Learners are given a specific problem and asked to bring back the answer or solution. References may be allowed to be used.
2. **Project assignment**: Learners are assigned to actually build or construct something. It may be as simple as a diary or as complex as a model.
3. **Textbook assignment**: Learners are assigned to study certain sections of a textbook. Along with the study, learners may be asked to answer questions or write a summary of the section.
4. **Library assignment**: Learners are given a task which can be completed using the resources in the library. A separate Skill Card is available.
5. **Drill assignment**: The learner is asked to memorize something (a poem, facts, or the steps in a process).

Guidelines

A good homework assignment requires planning, providing careful instructions, collecting, evaluating and returning. Each of these steps are discussed below.

Planning

The instructor should carefully plan the homework assignment to stimulate the learners' interest in the topic or skill.

1. Imagination should be used in creating assignments. For example, assignments should be tied to real-life situations. Learners approach homework with more interest if they can see the assignment's applicability and relevance.
2. Choose homework problems selectively. Include a reasonable mix of routine exercises and more challenging problems. Avoid excessively tricky problems.
3. Homework can (and maybe should be) fun. Provide games and puzzles from time to time.
4. Do the assignment yourself before giving the assignment to your learners. By doing this, you can see what is required to complete the problem and what difficulties learners might have. You will also be able to catch any errors in the instructions, problems or data provided.
5. Co-ordinate homework with lecture topics. Don't confuse your learners by giving assignments that require information, skills or techniques they have not yet acquired in class.
6. Distribute the workload evenly throughout the term. Try to pace the assignments so that learners don't have a massive chunk of homework during the last weeks of the term.
7. Give frequent assignments so that:
   - you have continual opportunities to see how your learners are doing;
   - learners become accustomed to regular and systematic study;
   - learners acquire a clear idea as to what kinds of problems or assignments they should be able to do.

Making the assignment

1. Give clear assignments. Make sure each assignment addresses:
   - **Who** will do the assignment (individuals, groups, etc.);
   - **What** is the assignment;
   - **When** is it due;
   - **Where** will the assignment be done (library, classroom, at home);
   - **Why** it is being assigned;
   - **How** should it be done;

- **"What if"** will be the penalty if turned in late.

1. Give learners tips on how to solve problems. Provide all the necessary information needed to solve the problem. Break complex problems into smaller parts;
2. Allow learners to ask questions about the assigned homework;
3. Allow sufficient time to complete the homework assignment;
4. Don't give homework assignments as a form of punishment.

Collecting

- Ask learners to submit assignments on time and in an organized, legible form.
- Instead of taking up class time to collect homework, have an "in-basket" where the homework is placed as the learners enter the class.
- Develop guidelines for homework that is not submitted on time. Communicate these guidelines to your learners. Involve your learners in developing homework guidelines.
- When homework is turned late, enforce the policy equally for all learners.

Evaluating

If the instructor doesn't collect and evaluate homework, learners will not take the homework seriously and will not benefit from it at all. Homework can be evaluated:

- by the instructor working alone;
- by the instructor working with each student individually and giving feedback;
- by the learners themselves, using answers provided by the instructor;
- by learners marking each others paper using answers provided by the instructor.

Returning

The key point here is to return the homework as soon as possible. Immediate feedback will help your learners and show them that their homework is important. Returning homework the next day is best. Homework that is returned weeks after the assignment is useless.

Conclusion

Homework gives the learner an opportunity to develop self-learning skills that will be useful the rest of his/her life. Homework can also provide the instructor with individual data about the learner that is sometimes difficult to obtain in the classroom. Used properly, homework assignments can help prepare both the learners and the instructors for good classroom sessions.

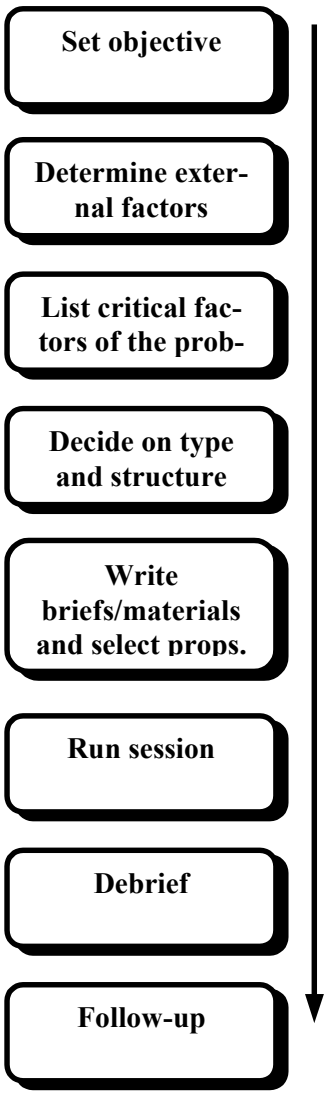
Performance Guide

Assign Homework

Did the instructor:	**Yes**	**No**
• **in planning homework:**		
1. plan creative and real-life assignments?	____	____
2. provide different types of assignments?	____	____
3. do the assignment him/herself?	____	____
4. coordinate the homework with the classroom topics?	____	____
5. distribute the workload evenly throughout the term?	____	____
6. give frequent assignments?	____	____
• **in assigning the homework:**		
7. tell "Who, What, When, Where, Why, How and What if?"	____	____
8. give learners tips on how to solve problems?	____	____
9. allow learners to ask questions about the assignment?	____	____
10. give sufficient time to complete the homework?	____	____
11. NOT give homework as punishment?	____	____
• **in collecting the homework:**		
12. ask learners to submit assignment on time and in an organized, legible form?	____	____
13. use an "in-basket" to collect homework?	____	____
14. develop guidelines for submitting homework?	____	____
15. enforce homework guidelines equally?	____	____
• **in evaluating homework:**		
16. evaluate all homework assigned?	____	____
• **in returning homework:**		
17. return homework promptly?	____	____

For good homework assignments all steps should be checked "Yes"

Design Role-Plays



Introduction

Are you looking for a way to change group dynamics and human relationships in your teaching sessions? How about a way to change attitudes? The solution is a very powerful technique called "role-play". A role-play can bring life into the classroom--if it is designed and used carefully.

Purpose

Role-plays:

- Relate theory to real life;
- Give an opportunity to practice difficult situations, new skills and approaches;
- Develop confidence;
- Reinforce positive habits;
- Provide information and change attitudes;
- Promote analytical skills through self-appraisal and through observing others;
- Improve group & human relation skills.

Design

1. Set objectives

Here we decide on how to integrate a role-play into the instructional situation. Will the objective focus on group dynamics or on an interpersonal skill?

2. Determine External Factors

Consider the following:

Group size

We can design a role-plays according to two group sizes

Single group role-play - Here learners can carry out the role-play as one pair or as a group

Multiple group role-play - Here several groups or pairs act out the same role-play at the same time. Some times the role-play can be conducted with or without observers.

Physical setting

Prepare a layout for the space where the role-play will operate. Make sure that everyone is able to see and hear the role-players.

Time

When we design a role-play we should consider:

- Time for preparing the group
- Time for the role-play itself
- Time for debriefing.

3. List of critical factors

The task is to decide on the actual situation to present to the role-players. It is helpful to consider the critical factors about the situation. We should prepare:

- a list of possible roles that ensures that all possibilities are looked at
- a list of critical issues
- a list of key communication channels.

Example: A role-play regarding a problem related to health service. For the role play:

Possible roles: Doctors, nurses, patients, etc.

Critical factors: Working hours, strike action; emergency service etc.

Key communication: Staff meetings, negotiations, board meetings, talks between patients and nurse etc.

4. Decide on type and structure

Types of role-plays are:

- **Character role-play**

In this role-play we should provide a set of facts about the person or character being played.

- **Position role-play**

This is like a character role play but we should not provide factor's relating to the character. We should give freedom to the player to play the role as he/she interprets the character.

- **Role- reversal role-play**

Here the group members assume the roles of the other persons with whom they must interact. For example, the instructor gets an opportunity to role-play the character of the principal.

The role-play can be structured or un-structured:

- **Structured role-play**

Use this structured role-play to develop the players' skills in specific procedures, methods or techniques. In this role-play there are predetermined goals and relationships. Therefore we must plan the whole exercise to cover a particular situation and explore it. The constraint and conflicts are built into the roles to achieve the required objective. In this role-play we must control at least the initial content of the scenario by scripting the roles.

- **Un-structured role-play**

Apply this role-play in situations concerned with learning about attitudes and motivations. Its objectives are more concerned with allowing the players to explore their own problems or situations. The actions flow freely from the player's own knowledge and wishes and may take a variety of turns and directions. We should not need to prepare any role instructions or background materials. There is no pre-determined endpoint and the players continue until they achieve the objective of the role-play.

5. Write Briefs/Materials

Develop clear and highly focused materials to use in the role-play:

Materials for the facilitator

These materials give the role-play information and directions for the facilitator.

- Notes for facilitator (goals, training outcomes, and behavioral objectives, timing, minimum and maximum group size, physical setting, preparation, step-by-step instruction for role-play, facilitating and processing guide lines)
- Introduction to role-play (background information for participants such as degree of skill needed).
- Role instructions or descriptions for all role players.
- Any background data sheets for role-players and/or observers.
- Handouts/lecture materials relate to role-play.

Materials for observers

These materials provide observers with a framework to record or focus their observations.

- Observers' instructions/guide (questionnaire or observer grid).
- Topical handouts (printed lectures, theoretical input, models)

Materials for participants

These materials give the role-play information and direction for participant about performing the role-play.

- Introduction to role-play (description of problem, situation, scenario, background information)
- Role instructions/description (a separate sheet for each role player)
- Any background data sheets for role players and/or observers
- Observers' Instructions/Guide.
- Topical handouts (printed lectures, theoretical input models)

5. Write Role Briefs

Consider the types of roles which entirely determine the structure of the role-play. They are:

Key roles

These are the roles which effectively define the problem area or the skill. The players in these principal roles should be able to influence the outcome of their encounters.

Subsidiary roles

These roles support the key roles.

Spare roles

In many cases the role-play may need to be used with a variety of different sizes and abilities. Therefore sometimes, we have to introduce extra roles to the role-play. The spare roles allow us to do this. When we cast the above roles, we have to remember that students playing different roles will learn different things. When writing individual roles, do it in two stages:

- Write the key features of the role
- Write the intended actions of the role

Key features available to the role could include:

1. Knowledge
2. Skills
3. Motivation and briefs
4. Constraints and pressures
5. Power and authority

When writing a scenario, consider the lines of communication between characters. Also consider the communication between the role-players and the world outside the role-play area.

The second stage of writing individual roles includes:

- Who should the characters meet?
- Under what circumstances?
- To do what? What decisions must they make?
- For how long?

The worth of the role-play depends on how successful you are in developing a script, that suits the specific objectives. The learning of specific skills may demand a highly structured brief. On the other hand, the less structured brief provides more opportunity for the players to learn about themselves.

Select props

Use props that are believable and internally consistent. Use realistic characters, manuals, and events including rules and procedures which might be used in the actual setting.

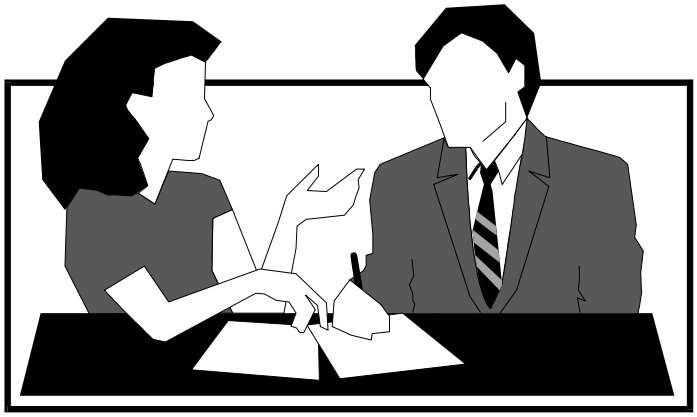
6. Run the session

Refer to the "Use Role-Plays" and "Conduct a Debriefing Session" Skill Cards.

Conclusion

A role-play is a very powerful and stimulating technique. It is an excellent way of developing interpersonal and communication skills and provides highly motivating and memorable lessons.

Use Role-plays



Introduction

Role-playing is a simple, but effective, technique for teaching the basic concepts of human relations and for gaining insight into why individuals respond the way they do in various situations. Role-playing can allow students to look at their own actions more objectively. As observers, they can perceive themselves in a role being played, feel how they would feel if treated that way. During the discussion period, they can hear how others feel about the behavior. Any criticism is directed toward a character in a role and not toward and individual.

Uses

Role-playing is frequently used for teaching employability skills, but there are many additional possibilities where human relations skills must be taught and learned. Many occupational areas require skills in dealing with customers and clients. Used properly, role-playing can accomplish the following :

- Stimulate student interest and participation in class
- Provide a kind of laboratory in which roles can be examined and experimented with.
- Give insight into the roles a person plays in real life and how effectively one plays those roles
- Teach students to perform new roles.
- Provide examples of behavior, which can be more effective than merely talking about the situation
- Help develop clearer communication, for it is sometimes easier to "act out" a situation than to put it into words
- Help students to have a more sympathetic attitude toward others and to understand their points of view
- Help students learn to express themselves
- Acquaint students with problems and possible solutions
- Demonstrate in advance how students will probably react under certain real conditions

Role-playing also teaches the important skill of putting yourself in the other person's shoes in order to understand how he/she will react in a particular situation and why. Thus, it is an important tool in helping students learn to get along with other people.

Role-playing is an effective way to test alternative methods of working in a group or handing a situation. Role-playing can be fun for those who observe, as well as for those who participate, and can, therefore, often stimulate interest. it is a technique combining effective learning with an enjoyable experience.

Types of role-plays

Role-playing generally has three forms: role-reversal, character role-playing and position role-playing. In **role-reversal,** group members assume the roles of the other persons with whom they must interact; For example, the instructor gets an opportunity to role-play Mr. Joshi, Principal of Kathmandu Technical School.

Character role-playing provides each player with a set of facts about the person they are playing. **Position role-playing** is like character role-playing, except the facts about the person are not given. Thus, one is free to play the role as he/she interprets it. For example, the actor plays the part of a typical store manager, rather than a particular store manager.

Role-play topics

The topics for role-playing situations are as broad as the area of human relations and problems. Problem situations are found in the home among family members; in the school among teachers, students and administrators; and on the job between employers and employees or between salespeople and customers.

Role-play guidelines

The following steps should be considered in involving students in a role-playing experience :

1. Prepare the students for the experience by familiarizing them with a problem situation the can relate to.
2. Discuss the situation and help students see the problem involved.
3. Orient students to the role-playing technique and define their roles thoroughly.
4. Call for volunteers and select the participants to act out the roles.
5. Give the participants a short preparation time (10 to 15 minutes) to think through the problem and the stand they will take.
6. Give each participant a name card to aid in preparing.

1. Proceed with the role-playing until the participants have had time to make their positions known. Then, stop while the interest is still high. The amount of time will vary with the situation, but usually 5 to 15 minutes are required.
2. Follow-up the role-playing experience with a carefully guided discussion. The follow-up activities you select will depend upon the objectives, but the following procedures are frequently used :

- Ask participants how they felt when certain things occurred. Ask the observers how they would have felt in the situation.
- Ask participants why they acted as they did in specific situations, and pose the same question to the observers.
- Ask what they learned from the role-play and how it related to how they would behave on the job.
- Ask for suggestions for alternative behavior in the situation. Summarize the learning experience.

3. Repeat the role-play with different students if students are still interested.

Role-play precautions

Certain precautions should be observed in a role-playing activity as follows :

- An individual should not portray a role involving his/her own personal problems. This can be painful and harmful.
- When analyzing a role-playing situation, speak of the role, not the students playing the role.
- Use volunteers only, if possible.
- Do not select a situation that might embarrass persons in the group.
- Discourage students from "hamming it up" in the portrayal of roles.
- Integrate the role-playing session into the total lesson; it should not be just a time-filler.
- Help students leave the simulated experience with a feeling that there may be more than one answer to problem.
- Do not rush the follow-up discussion, for this is an important period of learning.

Conclusion

Role-playing is a valuable tool for any instructor. When the learning objectives deal with attitudes, think of a role-play as the solution to your lesson planning.

Performance Guide
Use Role-plays

Use the following criteria to rate your role-play session:

		YES	NO
1.	Were the students prepared for the problem?	___	___
2.	Was the situation discussed ?	___	___
3.	Were students oriented to the role-playing technique?	___	___
4.	Were volunteers requested?	___	___
5.	Were participants given time to think about their roles?	___	___
6.	Were name cards given to each participant?	___	___
7.	Was the role-play stopped at a point of high interest?	___	___
8.	Were follow-up activities conducted?	___	___
9.	Was the role-play repeated with different students if the interest was high?	___	___

For a successful role-play, all items should be checked "YES".

Design Case Studies

Introduction

A good case study is a tool by which a piece of reality is brought into the training session. Case studies are similar to problem solving activities but with one big difference--they can be more effective because they involve the learner in real world experiences.

Definition

A case study is a written document containing all relevant data about an actual situation or event. Cases are focused on a person, an incident or a situation.

Purposes

The primary purpose of a case study is to develop the learners ability to think, decide and choose appropriate courses of actions. Applied properly, case studies help to:

- Get learners involved in the lesson
- Improve problem solving skills
- Improve decision making skills
- Increase learners ability to synthesize facts
- Allow theories to be applied to real circumstances

Advantages

A case study allows learners to look at their reactions and responses to specific situations and compare them with those of others. Thus learners:

- gain awareness that the real world problems can be addressed through many possible solutions
- develop a sense of objectivity
- develop increased tolerance for different points of view
- build up confidence in using new skills, concepts and theories

Disadvantages

Disadvantages of case study are:

- that case studies themselves do not actually present new information or a specific body of knowledge,
- that they make a heavy demand on the instructor in holding a discussion together and conducting effective debriefings,
- that they take more time to develop than lectures.

Characteristics

A case study consists of three main characteristics. These are:

- Specific time frame (short time or several days)
- Narrative structure (story about one or two persons)
- Plot structure (story told step by step revealing important information down to the point where a decision is required)

Design

A case study includes aspects that are relevant to training objectives, and relevant to learners. The instructor opinions, analysis, evaluation or answers should not be included.

The steps for designing a case study are:

- Identify the problem of the case (need for the case)
- Research the problem
- Write the case
- Edit and revise the case

Identify the problem of the case

In designing a case study, the instructor's objective is to help learners use concepts to analyze situations and make decisions. The instructor must first be clear about what learning is desired. Is the case study to be used to apply a concept or principle? The learning objective must be identified.

Research the problem

Collect appropriate and necessary data from individuals, groups, and other sources (books, lists, publications, journals). Many times, this research will lead to an actual case or at least to a situation or event that can easily be made into a case.

Write the case

Organize the data and write the first draft. First, it is necessary to:

- Sort the information
- Organize materials and notes
- Identify the case, situation or event to develop
- Prepare an outline of the case (Use a mind map!)
- Write the first draft

In creating a case study you need:

- Writing skills (A separate Skill Card is available)
- Editing skills (A friend, who is a journalist or language teacher could help)

The written case can be short or long, simple or complex, with a narrow or broad focus. The case must present:

- enough facts to make a decision
- emotions of key persons involved
- interactions between key persons
- physical realities and constraints
- other data (perhaps technical or financial data)

The case study will be easier to read and understand if it is written like a story. It should be concise and should not include unnecessary descriptions or details.

Edit and revise

Check the spelling and usage of words and clarify sentences. Check sentence and paragraph structure. Examine the writing style. When the first draft of the case study is completed, it is a good idea. to set it aside for a brief period of time. No matter how satisfied one is with the first draft, be sure that it will require a lot of revision.

Objectives for editing and revising

- scrutinize the way in which information is presented
- eliminate unnecessary information
- check whether the information is presented in an order that makes sense (A good story).

Use the Case Study

When an instructor decides to use a case study which illustrates a particular principle or problem the guidelines below should be followed:

Relate it to Learning Goals

Consider whether the case study:

- raises the issues the instructor wants to deal with
- can be completed adequately within time available
- involves the learners, but is not only "entertaining"

The primary question in the selection of a case study is whether it will teach the things that need to be taught. The instructor must ask "what are the goals of and for learners?" It may take a lengthy search to find a case study that is exactly right. However, it is better not to use a case study than to use an inappropriate one.

Relate to the Learner Group

The case should relate to the type of jobs and level of experience and/or knowledge of the learners. Learners need to be able to understand the background, situation, and the interrelationships in the case as well as the "facts" before they can use the study effectively. The instructor must be careful not to select cases that require a decision which is above the learners level understanding. The more closely the case study is related to your class, the move likely it is that the learners will take it seriously and become involved.

Preparation

The instructor must have a through understanding of the case before attempting to teach it. He/she must study the case itself before the training session, even if it is one that has been used before. Because the outcomes of a case study are different with each group, the instructor must be thoroughly familiar with not only the case but also with its ramifications. Willings (1968) suggests that instructors ask themselves specific questions when preparing to use a case study:

1. What is likely to be generated by this case?
2. What is the perceived problem? The real problems(s)?
3. Does the instructor have any biases?
4. What part of the written case can help in identifying and understanding the real problem?
5. How would the instructor solve it?
6. What questions are the learners likely to ask?
7. How long will the various steps in the process take?

Present the Case

Figure 1 shows the relationship between instructor and learner activities when case studies are used.

Conclusion

In one study comparing two classes taught by the case method with two classes taught by the lecture method, students scored better in knowledge and understanding in one of the classes using the case method. Both case study classes, however, were superior to the lecture class in their ability to apply concepts.

Figure 1 - Using a Case Study

INSTRUCTOR DOES	LEARNERS DO
Orient the case study	Listen to the instructor
Present the case study	Take over the case study
Observe learners progress	Discuss (study individually or in groups)
Lead the discussion	Participate in the discussion
Conduct the debriefing	Participate in debriefing

Prepare Transparencies

Introduction

"The more exciting and intense the activity, the more learning occurs." Using visuals is one way of adding excitement to your presentation.

In the last few years, the overhead projector (OHP) and transparencies have become popular. While they can make a difference, unfortunately many times we see instructors who use bad transparencies and do not know how to deal with this device effectively.

This Skill Card describes how to prepare transparencies. There is a complimentary Skill Card on how to present information using them.

Effective Visuals

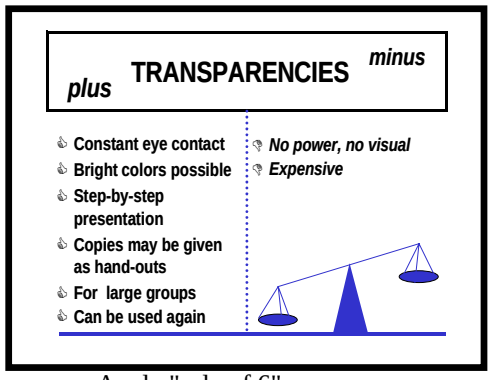
Before we talk about technical aspects of how to prepare transparencies, let us think a bit about criteria for effective visuals. Compare the two examples at the bottom of this page.

Effective visuals:

- Make an immediate impact
- Reinforce key concepts
- Use few words
- are big and bold
- Are easy to see
  also from the last row
- Are simple to understand

For **transparencies** this means:

- Use colors and simple illustrations



- Apply "rule of 6":
  - 6 lines per transparency
  - 6 words per line
  - 6 mm for smallest letter
- Use fonts and their sizes consistently.

NOTE: Transparencies are teaching aids only. What you are saying is more important than the visual. The most colorful transparences cannot make up for poor content presented by a boring instructor.

Design

Designing takes some time, but it definitely leads to better results. Long-term designing saves time, because you have to make the transparency only once.

Identify concepts to be visualized

Less is more: Too many transparencies create visual noise.

- Focus on **must**-concepts
- One concept per transparency is enough.
- Plan one transparency maximum for every 3 to 5 minutes talking time

Create uniform style

Normally we use several transparencies in one presentation. Uniform use of fonts and colors give a feeling of unity. Handmade or computerized templates are very useful tools for creating uniformity.

Prepare sketches

Prepare a simple sketch for each transparency and check how they link and match.

Preparing handmade transparencies

Handmade transparencies are relatively cheap, especially when it comes to the use of colors.

Materials

- Acetate sheets--clear and transparent plastic sheets
- Transparency marking pens--either water soluble or permanent
- Drawing instruments: templates, set squares, protractor, ruler, compass and dividers
- Correcting fluid for mistakes

Procedure

- Prepare a full size sketch of the transparency on a sheet of paper. As most OHP have smaller tables than A-4 acetate sheets, confine your

When you prepare transparencies you should consider:

Most important is your audience whose attention you should get. Therefore, do not try to pack too much information on one single transparency. It will become difficult to read and loose the impact it should have when giving a presentation.

Keep your messages as ***simple*** *as possible*. It's proven that short statements are better understood than long ones. ***Your computer*** has many fonts, but do not need to use all of them on one page, because that confuses the listener.

Use the transparencies to get the attention of your audience - not to loose it - by using illustrations.

Design for your learner ...

- ✓ **One idea, one transparency**
- ✓ **max. 6 lines, 6 words each**
- ✓ **readable print: big & bold**
- ✓ **words and images**
- ✓ **color where appropriate**

... get their attention ✓

design to an area 20cm×25cm. Paper with a grids helps you to get things evenly aligned.

- Place a clear acetate sheet over the sketch. Paper clips help to hold the sketch and transparency firmly together.
- Write or draw directly onto the acetate. Work carefully because the OHP magnifies even the smallest imperfection.
- Use either water soluble or permanent transparency markers. Permanent markers give brighter colors.
- Use sharp-tipped markers to outline and broad-tipped markers to color areas. Avoid coloring big areas because they may appear streaky.
- Use black and blue colours to write text and other colors for highlights.

Preparing machine-made transparencies

Materials

- Special acetate sheets for the photocopier: other acetates may melt and badly damage the photocopy machine.
- Special acetate sheets for ink printers: other acetates do not absorb the ink.

Procedures

1. Cut and paste

- Cut texts and illustrations out of books. These need a strong contrast to yield acceptable transparencies.
- Enlarge (or reduce) texts and illustrations to the right size.
- Paste them on a 20x25cm. clean white paper.
- Copy the *master* onto a transparency.

2. Computer design

- Input your draft design on the computer. Special software is available for this.
- Print the result to get the *master*. The quality depends very much on the printer.
- Copy the *master* onto a transparency.

Hint: You may add colors with the transparency markers.

Overlays

An overlay consists of several transparencies, each with one portion of the information. Together they add up to a complete picture. Overlays allow presenting complex concepts step-by-step.

When the overlay consists of only two or three parts, the easiest way is to lay one loose transparency over the other.

For overlays that are more complex, you need a mounting frame. Attach the transparencies on the frame with transparent masking tape.

NOTE: Place them in the right order and attach them well, or you will make a very bad impression when using the overlays.

Final check and storage

When finished, check your transparencies. Project them one by one onto a screen and assess them against the checklist on this page.

To safeguard the investment of money and time, you should store the transparencies in a file or a folder:

- Put them in the right order.
- Place a separator sheet of paper between two transparencies so they do not stick together.
- Store them together with the other materials according to the curriculum.

Conclusion

Transparencies are a handy media because you can prepare them ahead of time, and take them out when you need them. Attractive transparencies add impact to your presentations.

Performance Guide

Prepare Transparencies

1. One idea per transparency?
2. The entire transparency visible?
3. Letters big and bold?
4. Maximum of 6 lines and 6 words per line?
5. Few fonts and consistent use of them?
6. Colors and illustrations add impact?
7. Transparencies are clean and neat?
8. No spelling mistakes?

Effective transparencies meet all criteria.

Present Information with Transparencies

Introduction

People learn best when many senses are stimulated. Combining words with related pictures strongly increases the memory retention rate.

Well designed transparencies are an effective means for strengthening learning, provided the instructor is capable of using them properly in the classroom.

This Skill Card describes how to set up and use the overhead projector (OHP). There is a complimentary Skill Card on how to prepare transparencies.

Preparing the OHP

A proper set up of the OHP and the screen is a precondition for a successful presentation with transparencies.

The following steps show you how to set up the OHP:

1. Place the screen in the middle-front or front corner of the room.
2. Aim the screen at the center of the audience.
3. Place the OHP directly in front of the screen, 2-3 meters from screen.
4. Plug the OHP into the electrical supply (wall outlet).
5. Place the power cord to avoid a tripping hazard (tape to floor).
6. Place an example transparency, aligned carefully, in the center of the projection surface. Turn the OHP on.
7. Aim the projected image at the screen using the mirror and by moving the OHP. **Be careful**, turn off the OHP when you move it, and wait a few seconds, because the bulb might break!
8. Fill the screen with the projected image by moving the OPH either closer or further from the screen.
9. IF the screen can tilt, tilt it to align the image with the screen borders. Re-aim and re-focus.
10. Check the view to the screen from all parts of room.

Hints:

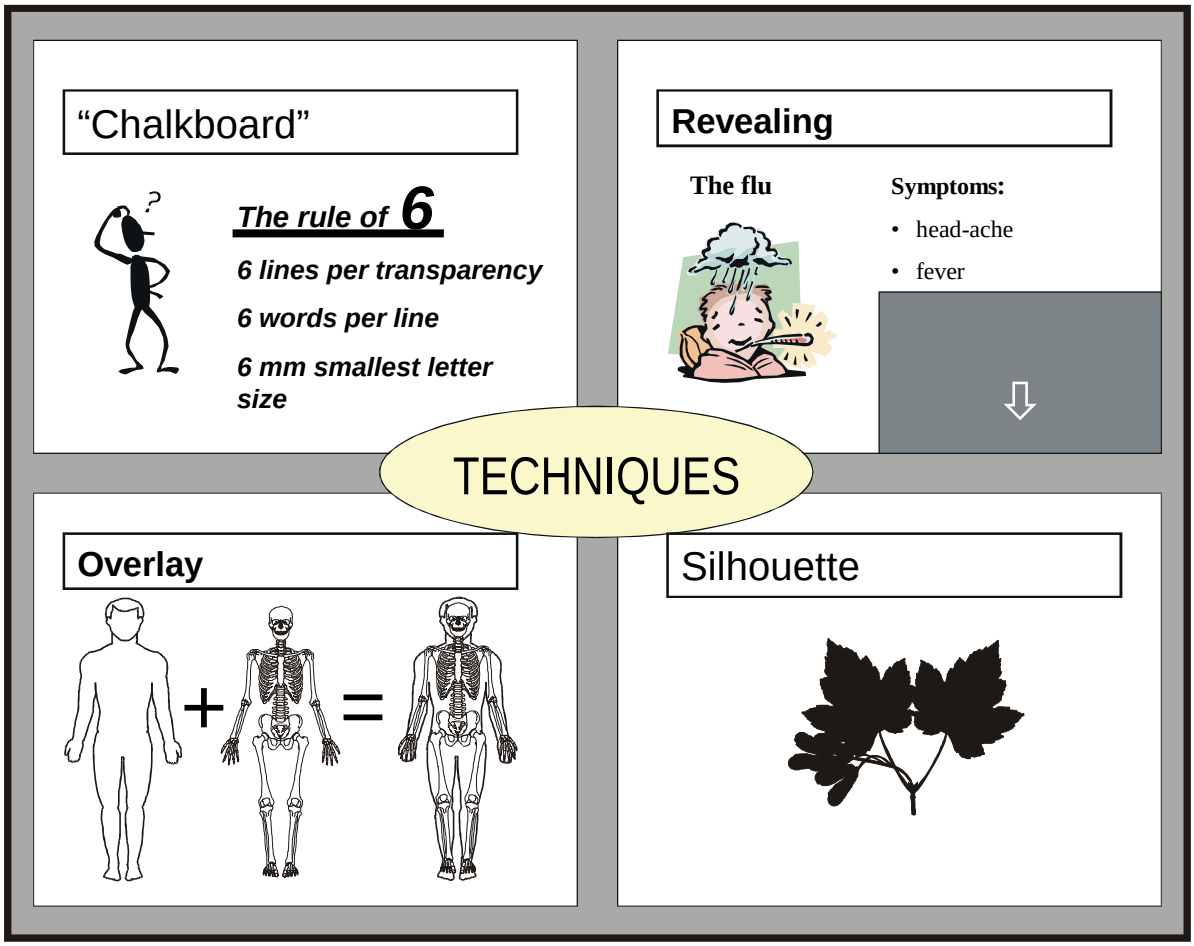
- Make sure that there is a spare bulb at hand.
- Often, you are at a place for the first time and somebody has already set up the OHP. Check to be sure that everything works, at the same time becoming familiar with the room.

Presenting Techniques

At the bottom of this page, we present four techniques for using the OHP.

Chalkboard

Draw and write on an empty transparency as if you were using the chalkboard.



Advantages:

- You face the class all the time.
- When the "board" is full, you just start with another transparency.

Disadvantages:

- The projection surface is very bright for your eyes.
- Bad handwriting is terribly enlarged.

Hint: You also can use half-prepared transparencies and complete them during the lesson.

Revealing

With this technique, you uncover one part of the transparency after the other. You direct the learner's attention to the point being presented, and prevent them from being distracted.

Moving a piece of paper down is the easiest way of revealing.

Overlays

Good overlays are very attractive. They consist of several transparencies, each having some of the information. Together they add up to a complete picture. Overlays allow presenting complex concepts step-by-step.

When using overlays, think of your learners and slow down. Learners need time to digest and to copy complex concepts. Prepare a handout to aid in copying.

Silhouette

Put small and relatively thin objects on the OHP. On the screen, the learners will see its shape.

Hints:

- If size is important, project a transparent ruler together with the object.
- If the objects have sharp edges, put a transparency underneath to avoid scratching the surface of the OHP.

Hints and tips for presenting

The following hints and tips may be useful for presenting information with transparencies:

Before the presentation

- Arrange your transparencies in the order you will be using them.
- Plan how to handle them. Determine where to place the ones to be presented and the ones already presented.

During the presentation

- After switching on the projector, avoid walking in front of the screen.
- Maintain eye contact. Read from the transparency and not from the screen. Do not read the content word-by-word--learners are able to read for themselves.
- Use a pencil or a pen to point out items of discussion. This helps trainees to focus.
- Change transparencies with the OHP switch off.
- Direct trainee's attention by turning the OHP on when you want the attention directed at the visual. Turn the OHP off when you want the attention directed back to you.
- Give learners time to digest the content of each transparency. Many of them might like to copy it into their notebooks or onto the handouts.

After the presentation

- Put the transparencies in the right order.
- Make note of improvements you might make for the next presentation.
- File the transparencies together with the other instructional materials. Do not forget to place a separator sheet between each of them.

Conclusion

The OHP is a marvelous instructional device. As it is rather expensive, use it creatively and not just for replacing the chalkboard. Apply different techniques and above all:

PRACTICE, PRACTICE, PRACTICE!

Performance Guide

Present Information with Transparencies

Did the instructor:

Preparation

1. Focus the OHP?
2. Check if the image is well centered on the screen?
3. Make sure that all can see the visual?

Usage

4. Present all the visuals in a logical sequence?
5. Maintain eye contact with the audience?
6. Avoid reading the visuals word by word?
7. Use the on/off switch to control the attention of the class?
8. Use a pointer?
9. Use effective presentation techniques?
10. Handle the transparencies calmly?

For a successful presentation, all items should be checked "Yes"

Present Information with Pin Boards

Introduction

Pin boards are boards with a soft surface on which cards of different size and colors can be pinned. Pin boards are very useful for presenting information step-by-step. Facilitators use pin boards for visualizing discussions.

This Skill Card describes the use of the pin boards for presenting information for example with an illustrated talk or a demonstration.

Materials

Besides pin boards you need:

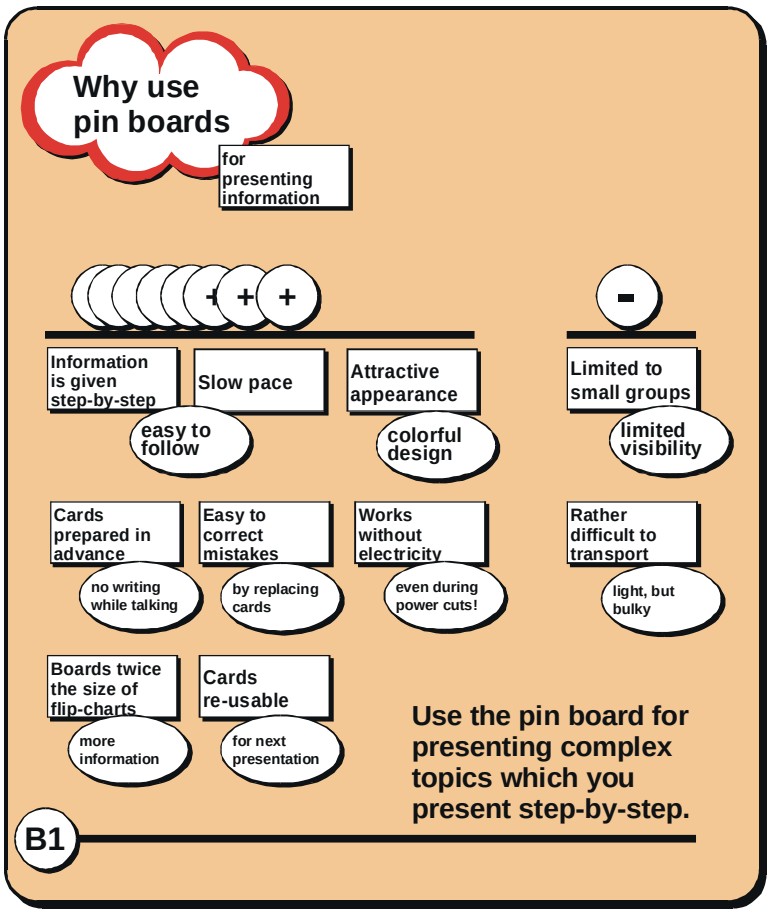
- Cards of different shapes, sizes and colors. The basic card has rectangular shape and the size of 1/3 of a A-4 sheet.
- Felt pens with chisel tip, pins, scissors and glue.

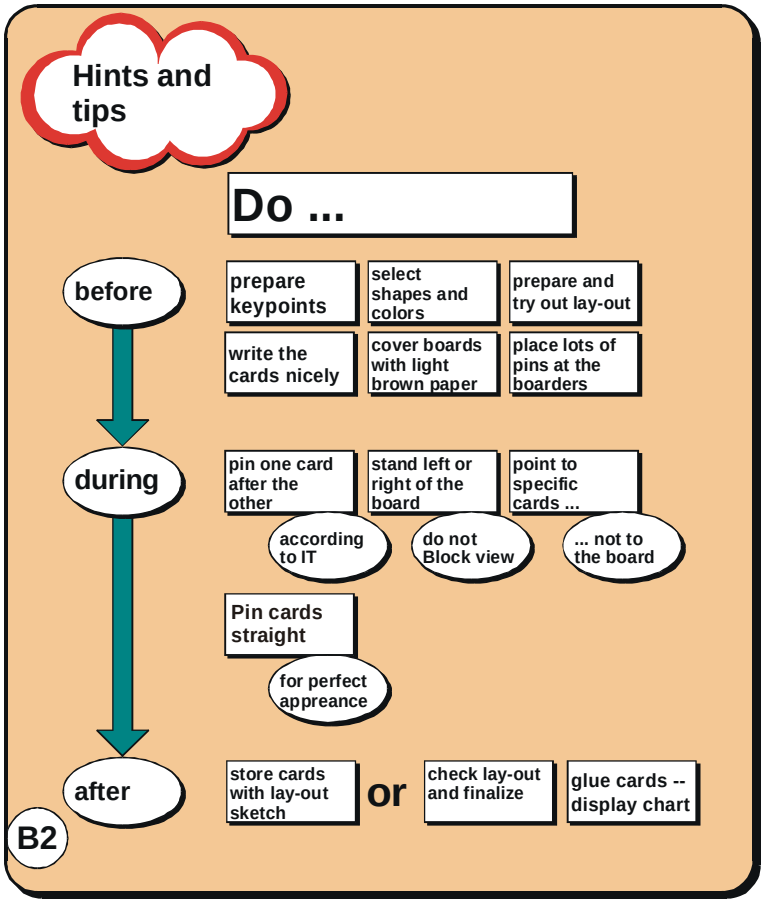
Do before .....

Preparation of the materials starts after finalizing the content of the presentation.

1. Design the overall lay-out. How many boards will you use? Which layouts are most convenient: Symmetric, sequential, cyclical or rhythmical? (see lay-outs on the bottom of the back side)
2. Decide on the shapes and colors of cards and markers. Be consistent! Shapes and colors carry meaning.
3. Writing the cards, observe the following rules.
   - One statement per card.
   - Maximum 3 lines per card.
   - Bold and printed letters.
4. Prepare an A-4 sketch and put them into the right order so that during the presentation you do not mix up cards.
5. Try the layout on the board.

The key concept is **visual discipline**. Create your own style and





then stick to it. Inconsistent use of shapes and colors confuses your audience. Having all charts and boards in the same style makes a professional impression and adds credibility to your presentation.

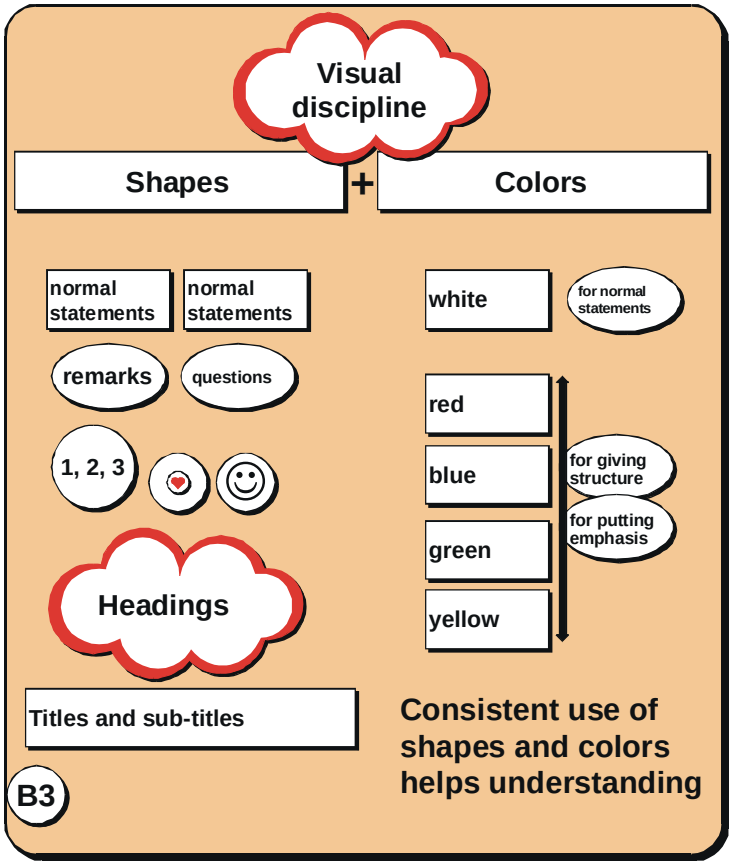
Do during ....

When the presentation is well rehearsed and all materials are at hand, the presenting becomes easy. Make sure that you post the cards at the right time and that everybody can see your visual.

Do after ....

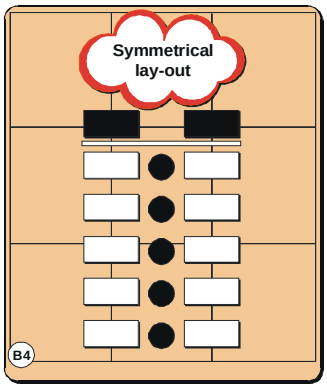
Store cards together with the sketch, so that you will be able to use them again.

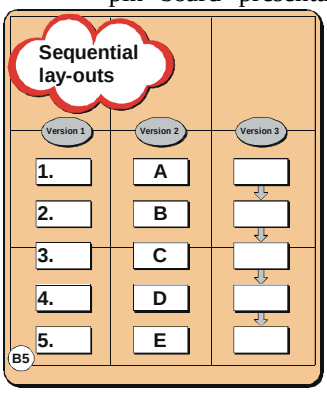
In every training, some charts are especially important. Glue the cards on the brown paper and hang these chart on the wall. Learners continue to learn from them, and they create a nice atmosphere.

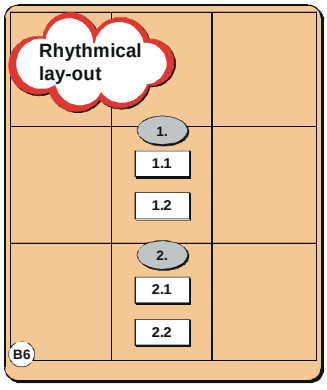


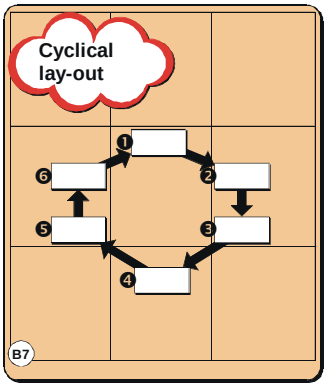
Conclusion

Pin boards provide a good visual support to your presentation. They can add impact and enhance learning. As long as the cards are not glued on the brown sheet, you can add contributions from your learners. Although you prepare everything in advance, pin board presentations always look like being-tailor made for the specific audience.









Performance Guide

Present Information with Pin Boards

Did the instructor

before use:

1. select a lay-out that matches with the content?
2. use cards consistently (size, colour, shape)?
3. write bold and big enough?
4. use one card for each idea?
5. check spelling mistakes?
6. organise sufficient pin boards?

during use:

7. make sure that the view of the pin boards is not blocked?
8. place cards according to content?
9. pin cards straight and leave free space?

after use:

10. glue cards and finalise the chart?, OR
11. store cards safely for the next time?

For an effective pin board presentation, most cards should be checked "YES".

Prepare Wall Charts

Introduction

Wall charts are simple forms of media containing pictures, words, and diagrams. These charts can be displayed on a wall--thus the name wall chart. The purpose of a wall chart is to:

- instruct
- inform
- gain the attention of the learner.

Advantages

Wall charts:

- can be prepared ahead of time
- are independent from electricity and special equipment
- are easy to make and store
- are permanent media
- can involve students in their preparation
- create a nice classroom environment.

Disadvantages

Wall charts:

- can accommodate only a limited amount of information;
- are effective for small groups only;
- are difficult to correct if mistakes are made.

Materials Needed

Only simple materials are needed to produce and use wall charts:

Paper

Select paper that is not easily torn so the charts can be reused. The size of a wall chart should be not be less than A2 size. Colored paper sheets are handy for coloring illustrations.

Markers

A variety of markers is available in different sizes, shapes and points. A good marker should:

- have a strong tip to withstand the pressure while writing or drawing
- move smoothly over paper
- have tips broad enough for reasonably thick lines.

Colored pencils and watercolors can also add to the impact of a wall chart.

Drawing instruments

Rulers, a compass, and other drawing aids come in handy for making straight lines circles, etc. These can make the wall chart look more professional.

Chart 1
Chart Styles and Uses

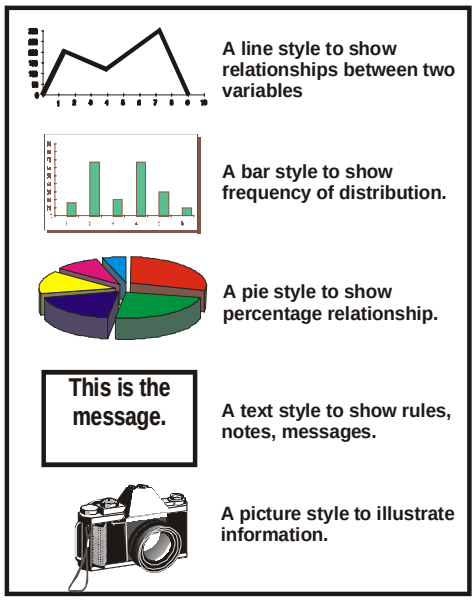
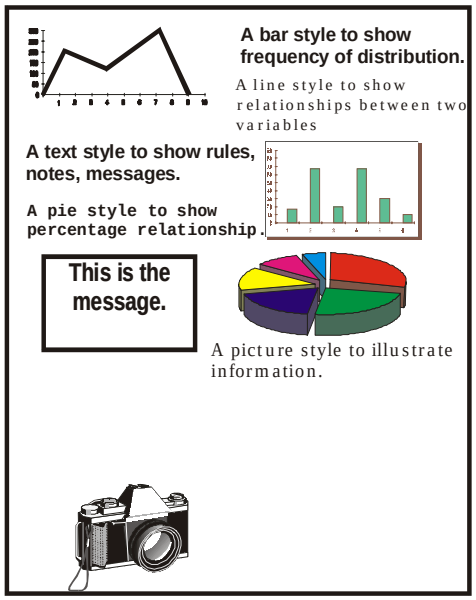


Chart 2
Chart Styles and Uses



Cutting tools

A paper knife or scissors is good to have. When you make mistakes on a chart, throwing it away and starting over is not always the best option. Making a correction saves time and paper. By using a paper knife, you can cut the mistake out and patch it up with a correction.

Chart Styles

Table 1 shows common styles of charts and their uses.

Design Technique

A good design helps in capturing the attention of the learner. A clear and neat design helps the learner to understand the content of the wall chart.

Lay-out

If we plan how the space in the whole chart will be utilized, we will make fewer mistakes and produce better charts. Planning helps avoid overcrowding. Look at the difference between Chart 1 and 2. Planning also helps to eliminate poorly balanced (top heavy, bottom heavy, etc.) charts.

Spacing

Even spacing between words and letters makes the chart look better. The spacing between two straight letters may need to be bigger than between two round letters in order for the spacing in the whole word to look the same.

Lettering style

There are many types of lettering styles from which to choose. A simple and easy to read style is best. Emphasize important words with capitals, underlining, using boldface letters or by the careful selection of colour. Limit yourself to two styles of letters on one chart.

Color

The consistent use of color in charts make them more effective. Use color for emphasis or for different parts of a diagram. More than three or four colors are not very effective. The colors with the greatest visibility are black, blue and red. Chart three shows which color gives a good contrast on which background.

Chart 3:

Color contrasts

Marker	Paper: white	Paper: blue	Paper: red
☑	black red blue green	black red	blue black
☒	yellow	yellow green orange	yellow green

Size of letters

Letters should be a minimum of 2cm tall. Make headlines distinct using larger size letters.

Enlarging Techniques

Many times, an instructor finds a chart or diagram in a book that would make a nice wall chart. The only problem is that the picture in the book is too small. You can use two simple techniques to enlarge the drawings.

Grid method

1. Cover the small picture with a grid of evenly spaced pencil line squares.
2. Draw the same number of bigger squares on a larger paper (where you want the enlarged picture).
3. Draw, with a pencil, what you see in each small square into a large square and complete the whole grid.

Projection with OHP

1. Trace or copy the image onto a transparency or make a photocopy transparency from the book.
2. Project the image onto a wall and adjust to the right size of enlargement (according to paper size).
3. Place the paper on the wall with the projected image on it and draw over the projected image lines.

Storage

Wall charts are reusable and storing them properly adds to their life. Common ways of storing are:

Store flat

If a large drawer flat file cabinet is available, the wall charts can be stored flat in a drawer.

Store hanging

Make a simple rack, attach the charts to a frame, and suspended them so that they hang vertically.

Hints and Tips

- Keep the chart simple.
- Present one idea on one chart.
- Plan the content layout on a piece of small paper before working on the actual chart.
- Leave a lot of white space.
- Put a headline or title at the top of the chart.
- Make important points dominant.
- Try to follow the "rule of 6" - do NOT use more than 6 words per line and 6 lines per chart.
- Search available books and magazines for relevant pictures and diagrams. You need not be an artist to produce charts.
- Use upper and lowercase lettering. It makes reading easier.
- Check for mistakes and correct before using.
- Put up a chart in the classroom without discussing it. Often learning happens from a chart alone.
- Have students develop wall charts and exhibit the products to encourage them.

Conclusion

A carefully prepared wall chart is a handy medium of instruction. It is reusable, requires simple materials, and is easy to use. It doesn't take an artist to produce a good chart. With a little practice and a little creativity, an instructor can prepare wall charts that improve instruction.

Performance Guide

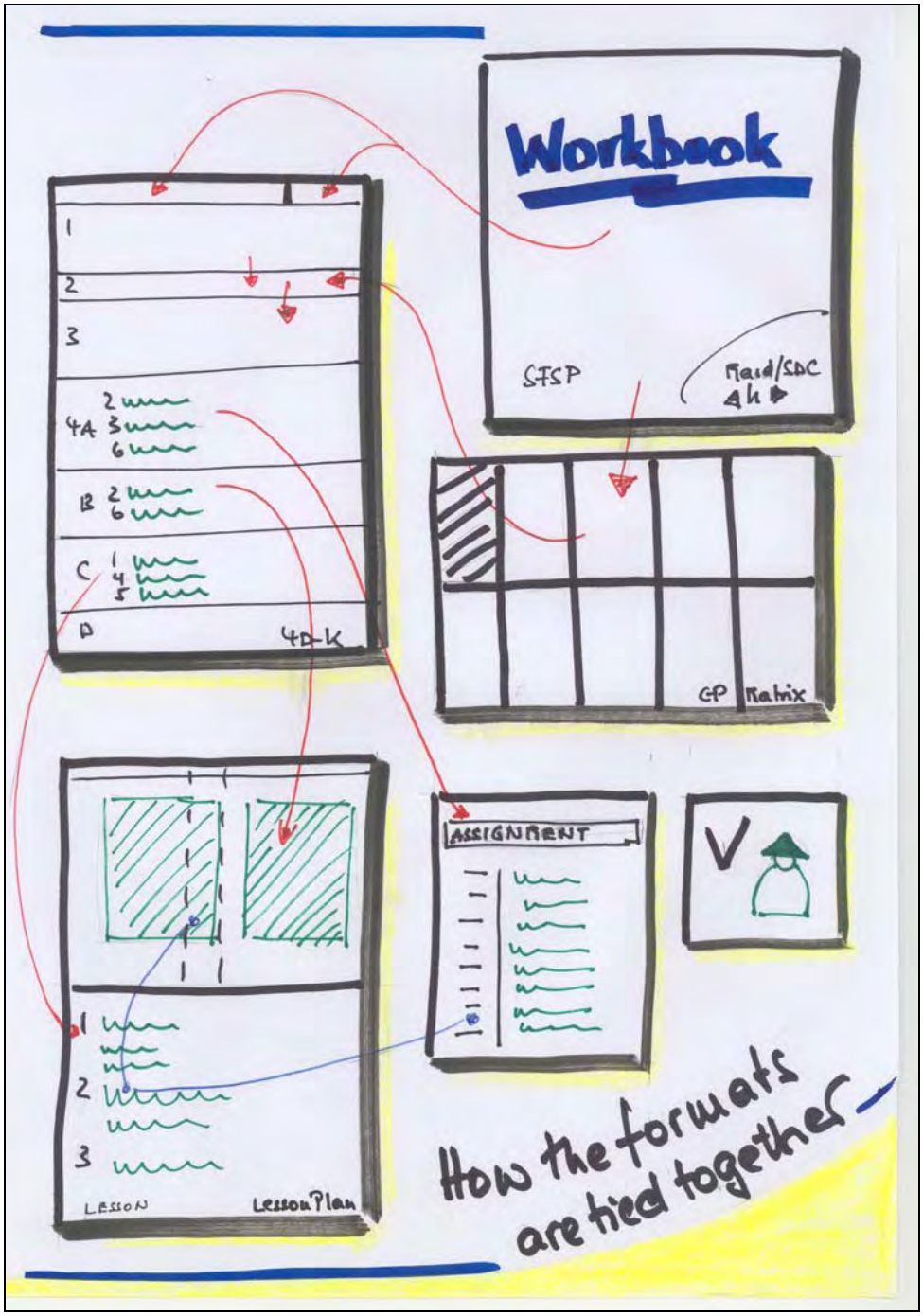
Prepare Wall Charts

Did the instructor:

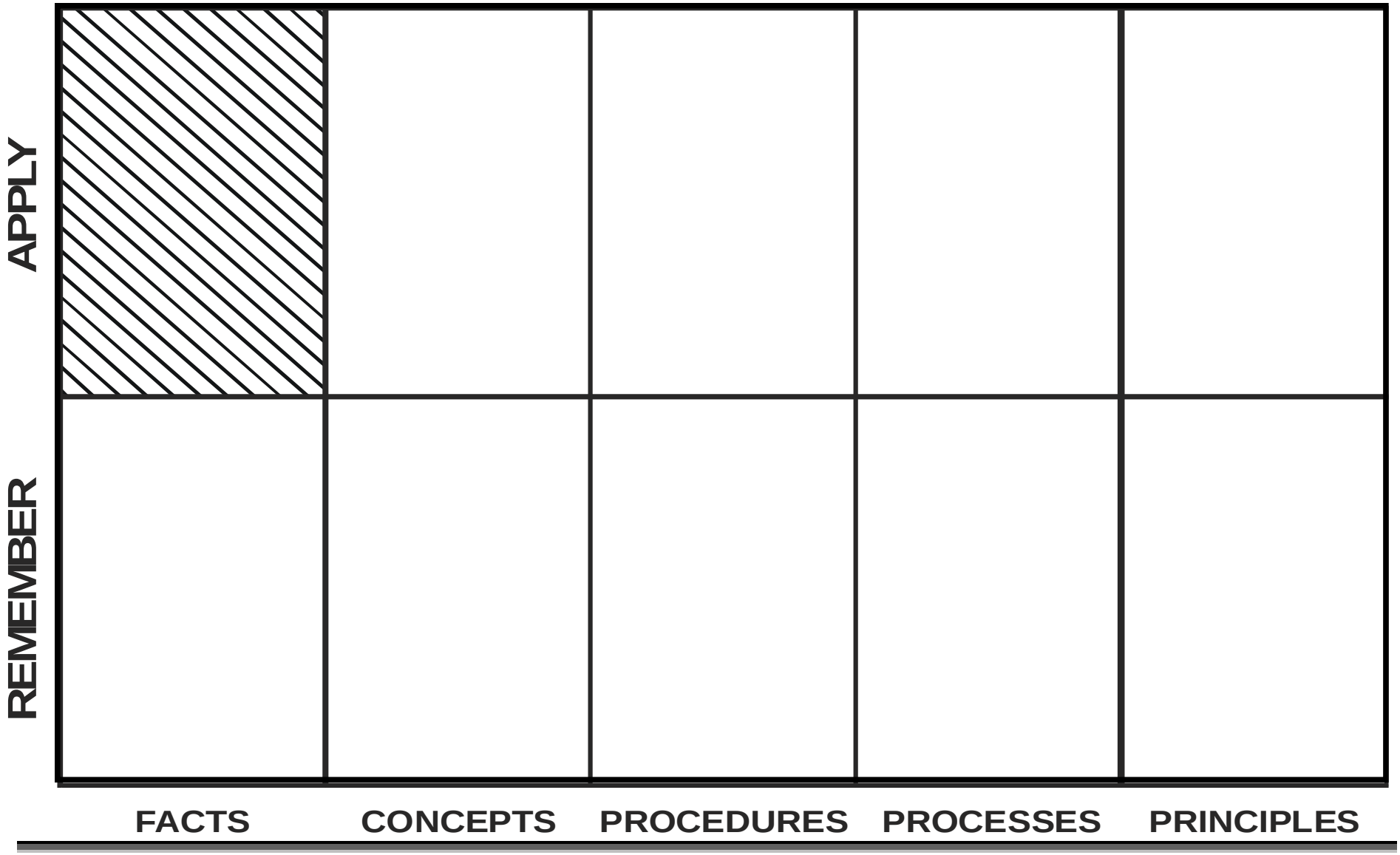
1. select relevant contents for the chart?
2. select an appropriate style of chart?
3. limit the chart to one idea?
4. use simple and easy-to-read lettering?
5. space letters and words uniformly?
6. write letters bigger than 2cm.?
7. use color with good contrast?
8. use the "rule of 6?"
9. balance the content on the chart properly?
10. store the chart properly?

For a good wall chart all steps should be checked "Yes."

B3 Forms


Workbook
SFSP
Read/SDC
4h
1
2
3
4A
2
3
6
B
2
6
C
1
4
5
D
4D-K
GP Matrix
ASSIGNMENT
V
1
2
3
LESSON
Lesson Plan
How the formats are tied together

TOPIC:	**Time:**
1. How does this topic relate to the job?	Typical situations, criteria
2. Which K is indispensable?	
3. What must the learner be able to do by the end of the training? Learning Objective	Performance test (procedure or product), written test, project, oral questions, assignment **Given:** **What:** **How well:**
4. How can instruction help? **A. What learner activities or experiences will help?**	Reading, group activity, practice, assignment, role-play, peer tutoring, brainstorming, research, case studies, Phillips xyz, ...
B. What visuals or job-aids will help?	Learner produced visuals or job aids, blackboard sketches, transparency, flip chart, wall chart, slides
C. What other instructor input will help?	Introduction, demonstration, illustrated talk, coaching and feedback, assignment, debriefing
D. How will learners deal again with the topic during the training?	Projects, problems (individual and team)


APPLY
REMEMBER
FACTS
CONCEPTS
PROCEDURES
PROCESSES
PRINCIPLES

Visual Title:	**Est. Time:**	**#**

Chalkboard, Slides	OHP	Pin Board, Flip Chart

NOTES:

SFSP Assignment Sheet

Date:

Subject:

Topic

Task

What to do?

Procedure

How to do?

Time

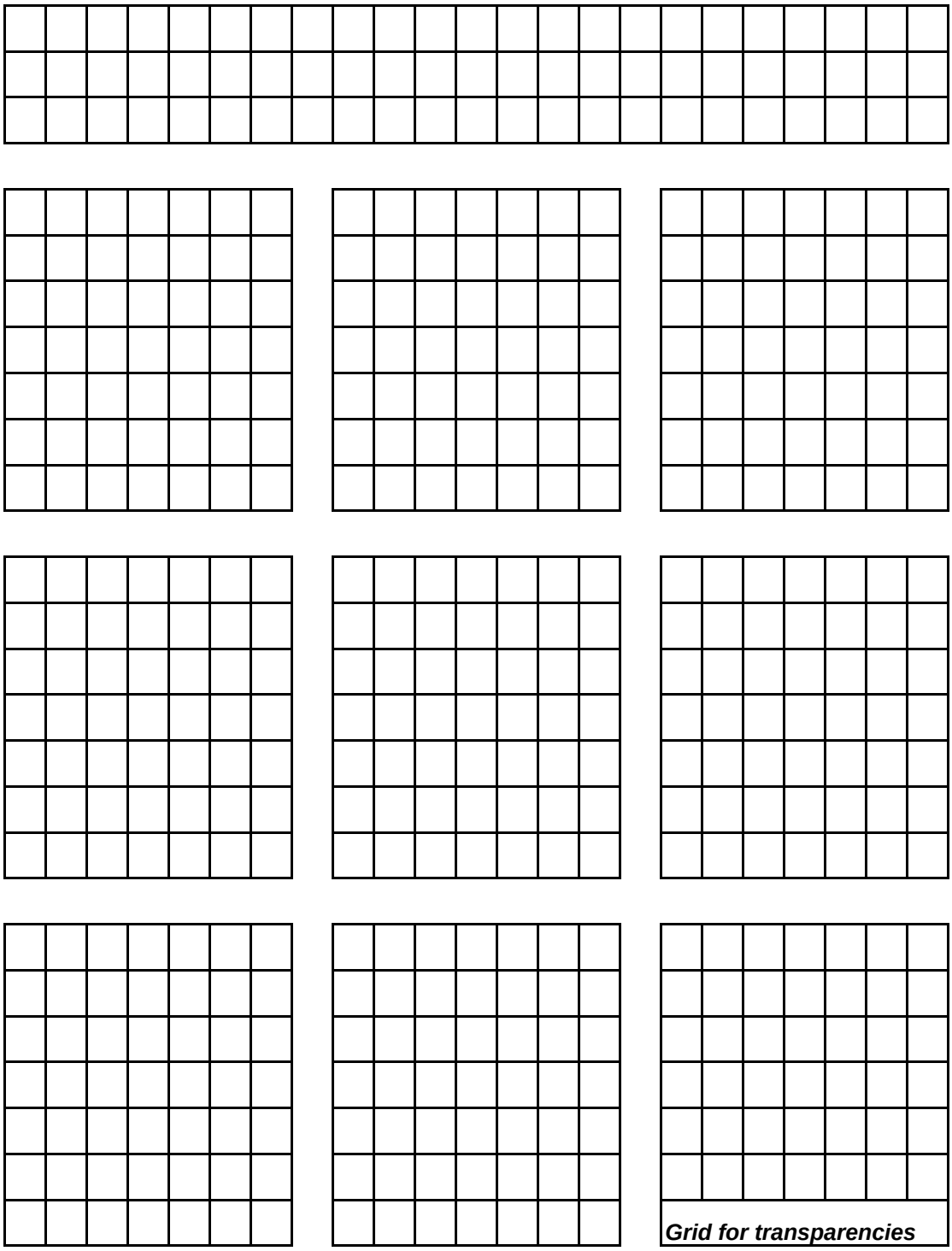
When to finish?

Presentation

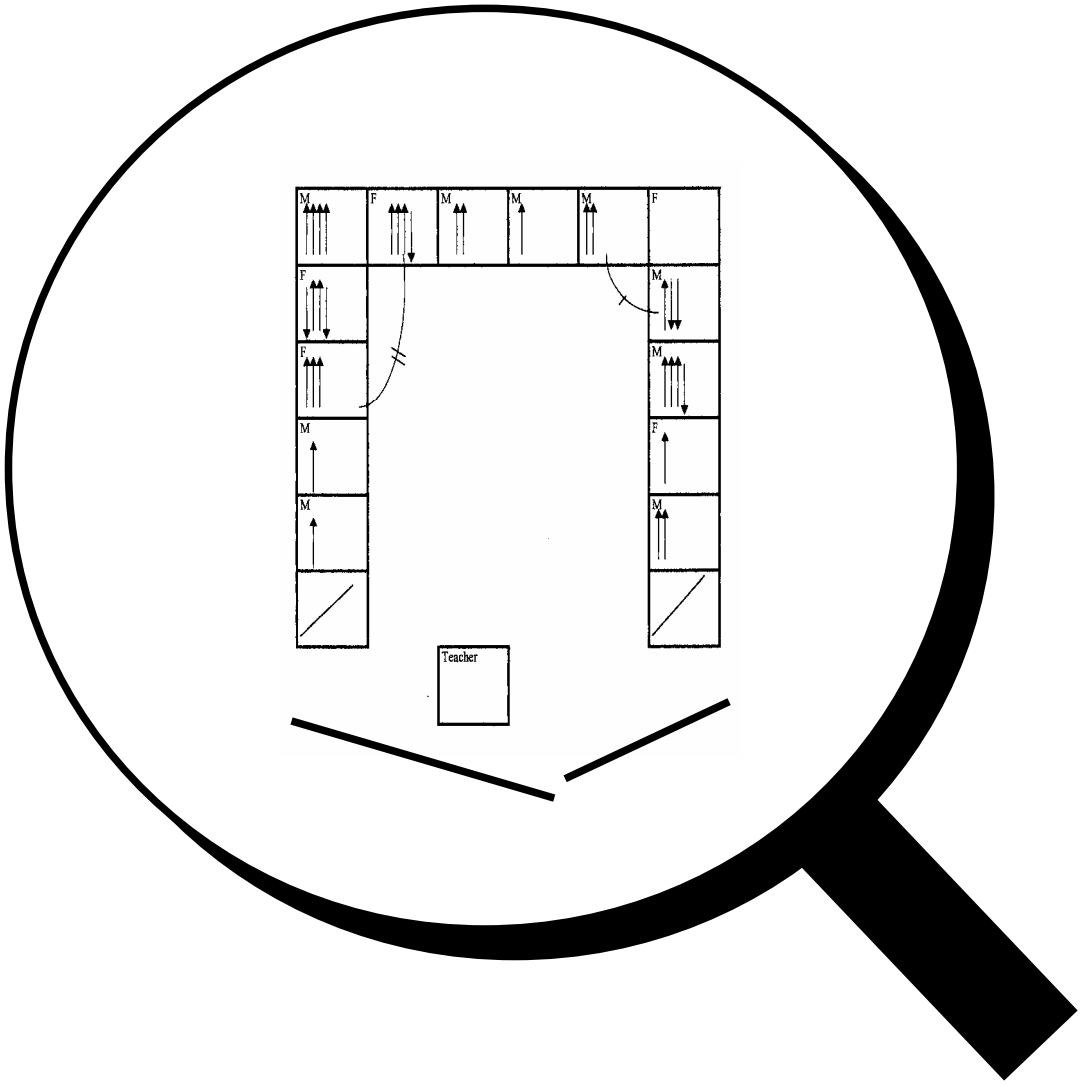
How to show the result?

Criteria

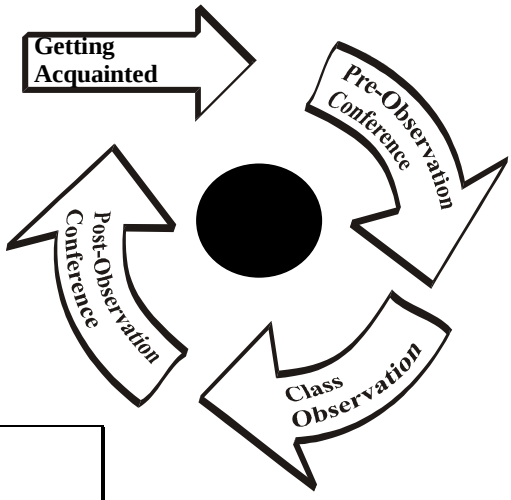
How well to do?

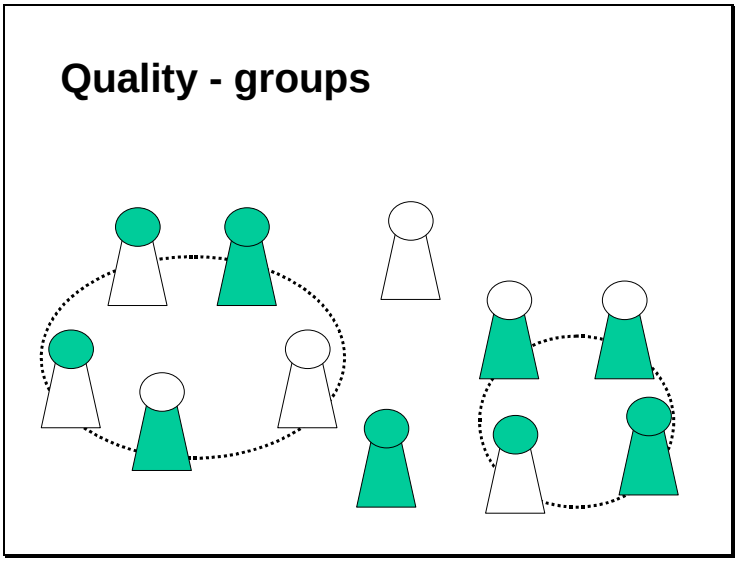

Grid for transparencies

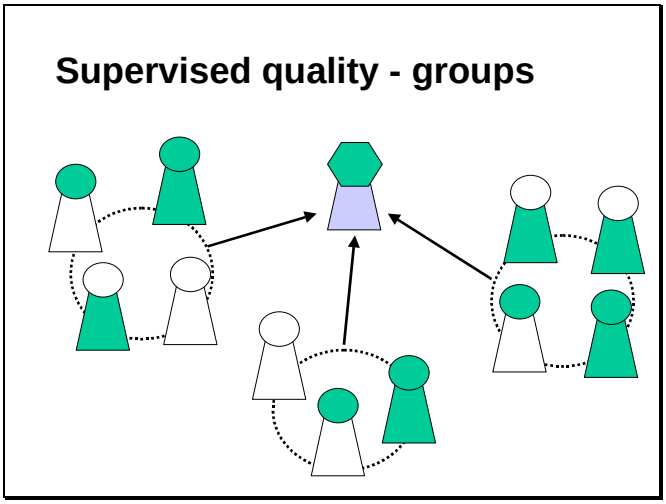
Section C:
Instructional Supervision



C 1 Handouts


Getting Acquainted
Pre-Observation Conference
Class Observation
Post-Observation Conference


Quality - groups


Supervised quality - groups

The Concept of Instructional Supervision

What is Instructional Supervision?

Instructional Supervision is a service to teachers, both as individuals and as groups. It is a means of offering to teachers specialized help in improving instruction.

Instructional supervision is a support. It is a professional way to help teachers to grow. By no means is instructional supervision assessment.

How do we proceed?

Instructional supervision is a structured procedure that consists of five steps. Each step has its own purposes.

Steps	Purposes
1. Getting acquainted	• Get to know each other and the situation in which the teacher will be observed • Exchange expectations and possible fears
2. Pre-Observation Conference	• Inform the observers or supervisor(s) about: ♦ The topic of the lesson and learning objective ♦ The lesson plan • Agree upon: ♦ The lesson(s) that will be observed ♦ What data will be collected ♦ How the data will be collected ♦ Rules to be followed during the observation
3. Classroom Observation	• Observe the performance of the teacher and the students • Collect the data agreed upon
4. Preparation for Post-Observation Conference	• Analyze the data obtained during classroom observation • Select specific points to be discussed in the post-observation conference
5. Post-Observation Conference	• Share observations and reflections • Discuss possible improvements • Set goals until the next supervision • Develop a plan on how to achieve the goals

What and how do we observe?

Theoretically, we could observe what ever the teacher would like to be observed and to get feedback on. In the last few years, SFSP has put lots of efforts into the introduction of so-called "learner-centered teaching methods" (LCTM). Therefore, we focus mainly on those aspects that indicate active participation of the learners during the lesson. Active participation means that the students do more than listening, taking notes or occasionally answering questions.

We observe:

- the interaction between the teacher and the learners as well as among the learners - questioning and dealing with learners' questions and contributions.
- the (individual and group) learners - all activities from the assignment to the debriefing.

What to observe	**Whom to observe**	**How to observe (observation tools)**
Platform skills	Teacher	Performance Guide of Skill Card "Platform Skills"
Assignments	Teacher	Feedback from the learners on the assignment (clarity, challenge, contribution to learning)
Debriefing	Teacher	Use of questionnaire
Questioning/dealing with learners' contributions	Teacher	Record of questions and classification according to levels
Interaction	Teacher, students	Record with the form "Whom do I hear?" Record with seat chart
Learners' involvement	Students	Record with the form "Learner-centered Observation Instrument"

If a specific method (e.g. brainstorming) is used, the performance guide of the related Skill Card is the most suitable observation tool.

Videotaping can be a very helpful tool as well, because it allows the observed teacher to observe his own behavior in front of the class, to make a self-critical review of the lesson and to verify (or falsify) the received feedback.

Models of Instructional Supervision

With this first round of instructional supervision we gave all partner universities a first experience and insight into this means of stimulating the professional growth of teachers. Everywhere the experience was evaluated as rich and rewarding, but that does not mean that in future this mutual support through classroom observation and feedback will take place automatically. At least, the experience elsewhere suggests that without a well defined concept little will happen.

What to do? What could be the next meaningful steps?

Before discussing possible steps and eventually taking decisions, it is necessary to analyze the situation and explore possibilities.

Responsibility

Instructional Supervision serves the purpose of improving the quality of the teaching-learning process. It can be done in different ways and by different persons or entities. It is important to be clear about who will be responsible for this duty.

Responsibilities

- Training Department
- Faculty or Department of Forestry
- Department of Social Forestry

- INDIVIDUAL TEACHER

Instruction takes place in the "protected space" of the class(room). Therefore, the individual teachers cannot escape from being responsible for the quality of her or his own instruction. The quality of instruction largely depends on the quality of the teachers and their willingness to grow constantly and develop professionally and personally.

We also have to acknowledge that instruction is the key process of any educational institution. Therefore, the institution has the obligation to help the teachers in their efforts of becoming better and better. A clear commitment from "above" is like the fuel that keeps the fire alive. In the case of the five partner universities of SFSP, it could be either the Training Department, the Faculty of Forestry or the Department of Social Forestry who takes up this responsibility. Each entity has its advantages and limitations.

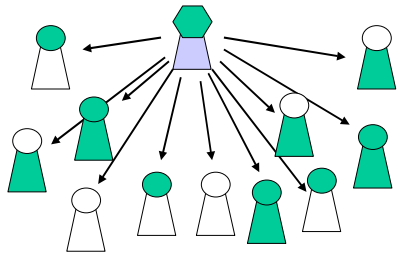
Focus

Likewise it is important that we define the focus of the instructional supervision. Do we look at the "how", at the "what" or at the "how and what"? Obviously this decision has an impact for instance on the selection of the supervisors. For the technical content we probably need supervisors with different profiles than for methodology.

Organizational Set-up

There are different ways for setting up instructional supervision within our partner universities. It's up to each partner to choose the set-up that that best suits its specific situation .

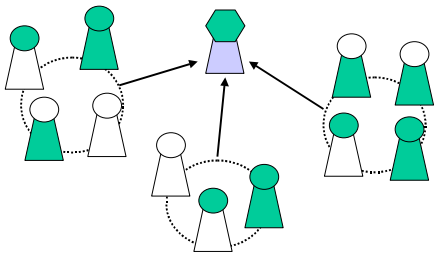
Supervisor



A specially trained supervisor visits the classrooms regularly, observes the performance of the teachers and gives them feedback. Instructional supervision takes place outside the routine evaluation of the university.

- The supervisor is a teacher who is recognized by his fellow teachers and the students for his metho-dological competence.
- The participation of the teachers can be compulsory or voluntary.
- The cooperation between the teacher and the super-visor is individualized and strictly confidential.
- The supervisor reports to his superior (in the Facul-ty or in the Training Department). The reports are kept in general terms and must not disclose any information about individuals.

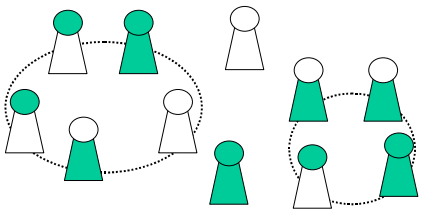
Supervised quality - groups



Small groups of teachers meet and visit each other regularly with the aim of helping eachother to improve instruction. A supervisor regularly checks the progress of the quality groups and how they comply with the minimal required standards of cooperation.

- The "supervisor" is located higher in the hierarchy and has the power to take actions, if a group does not work properly.
- The participation is compulsory. Each teacher has to be member of a quality group. The groups form themselves.
- Each quality group is fully managed by its mem-bers. They decide about the content and form of their cooperation as well as the schedule.
- The groups report about their cooperation to the supervisor. They are not obliged to give him any information about individual teachers.

Quality - groups



Small groups of teachers meet and visit each other regularly with the aim of helping eachother to improve instruction.

- The participation is voluntary. The quality groups form themselves. Nobody is forced to join a group.
- Each quality group is fully managed by its mem-bers. They decide about the content and form of their cooperation as well as the schedule.
- The quality groups may report to their immediate superior. They decide what information they give.

C 2 Forms

Period 1: Minute: *8.30 . 8.35*

Teacher	||||| ||||| ||||| ||||| |	21
Student(s)	|||||	5
Teacher and students	|	1
Nobody	|||	3

Period 3: Minute*: 9.02 - 9.07*

Teacher	||	2
Student(s)	||||| ||||| ||||| ||||| ||||	24
Teacher and students	||	2
Nobody	||	2

Voice

Clear ✓ Volume comfortable
Rate of speech Variation in rate & volume
Pronunciation ✓ Filler words
Pauses ✓

Vocabulary & language

Appropriate Understandable ✓
Correct ✓ Technical terms explained ✓

Body Language

Eye contact (3 seconds) ✓ Friendly ✓
Enthusiastic Variation in facial gestures, expressions
Relaxed posture ✓✓ Confident
Calm movement ✓ Good positioning in the room ✓

Whom do I hear?

1. Before the lesson, define four periods of observation. Each period has a duration of five minutes. (Example: Duration of lesson. 60' - observation periods: 3 - 8, 15 - 20, 31 - 36, 49 - 54)
2. In each periods, record every 10 seconds, whom you hear.
3. At the end, calculate the numbers.

Period 1: Minute: _____	
Teacher	
Student(s)	
Teacher and students	
Nobody	

Period 2: Minute: _____	
Teacher	
Student(s)	
Teacher and students	
Nobody	

Period 3: Minute: _____	
Teacher	
Student(s)	
Teacher and students	
Nobody	

Period 4: Minute: _____	
Teacher	
Student(s)	
Teacher and students	
Nobody	

Summary	
Teacher	
Student(s)	
Teacher and students	
Nobody	

Remarks

Whom do I hear?

1. Before the lesson, define four periods of observation. Each period has a duration of five minutes. (Example: Duration of lesson. 60' - observation periods: 3 - 8, 15 - 20, 31 - 36, 49 - 54)
2. In each periods, record every 10 seconds, whom you hear.
3. At the end, calculate the numbers.

Period 1: Minute: *8.30 . 8.35*		
Teacher	||||| ||||| ||||| ||||| |	21
Student(s)	|||||	5
Teacher and students	|	1
Nobody	|||	3

Period 2: Minute: *8.46 - 8.51*		
Teacher	||||| ||||| ||||| ||||	19
Student(s)	||||| |||||	10
Teacher and students		
Nobody	|	1

Period 3: Minute*: 9.02 - 9.07*		
Teacher	||	2
Student(s)	||||| ||||| ||||| ||||| ||||	24
Teacher and students	||	2
Nobody	||	2

Period 4: Minute*: 9.10 - 9.15*		
Teacher	||||| ||||	9
Student(s)	||||| ||||| ||||| ||	17
Teacher and students	|	1
Nobody	|||	3

Summary	
Teacher	**51**
Student(s)	**56**
Teacher and students	**4**
Nobody	**9**

Remarks

- Teacher shows very encouraging attitude towards the students.

Learner Centered Observation Instrument

SEE (many)	**2**	**5**	**8**	**11**	**14**	**17**	**20**	**23**	**26**	**29**	**32**	**35**	**38**	**41**	**44**	**47**	**50**	**53**	**56**	**59**
Chalkboard (text)																				
Chalkboard (diagram)																				
Flipchart/Wallchart																				
Handout/book																				
Model																				
Photographs																				
Pinboard/cards																				
Real objects																				
Slides																				
Transparencies																				
Video																				
HEAR (many)	**2**	**5**	**8**	**11**	**14**	**17**	**20**	**23**	**26**	**29**	**32**	**35**	**38**	**41**	**44**	**47**	**50**	**53**	**56**	**59**
Teacher talking																				
Student (one) talking (presenting)																				
Buzz (many students talking)																				
Noise (task related)																				
Noise (disturbance)																				
Nothing related to lesson																				
DOING ON-task (one)	**2**	**5**	**8**	**11**	**14**	**17**	**20**	**23**	**26**	**29**	**32**	**35**	**38**	**41**	**44**	**47**	**50**	**53**	**56**	**59**
Assisting students (helping)																				
Listening																				
Note-taking																				
Observing practice																				
Practizing (or working)																				
Reporting/reciting																				
Taking test																				
Talking to student (one)																				
Talking to teacher																				
Working in group																				
Working on assignment																				
Writing on chalkboard (flipchart)																				
Other																				
DOING OFF-task (one)	**2**	**5**	**8**	**11**	**14**	**17**	**20**	**23**	**26**	**29**	**32**	**35**	**38**	**41**	**44**	**47**	**50**	**53**	**56**	**59**
Daydreaming																				
Playing																				
Talking																				
Walking around																				
Waiting																				
Other																				

Learner Centered Observation Instrument

SEE (many)	**2**	**5**	**8**	**11**	**14**	**17**	**20**	**23**	**26**	**29**	**32**	**35**	**38**	**41**	**44**	**47**	**50**	**53**	**56**	**59**
Chalkboard (text)		✓	✓	✓	✓										✓	✓	✓			
Chalkboard (diagram)																				
Flipchart/wallchart										✓	✓	✓	✓	✓	✓	✓				
Handout/book							✓	✓	✓											
Model																				
Photographs																				
Pinboard/cards																				
Real objects																				
Slides																				
Transparencies																				
Video																				
HEAR (many)	**2**	**5**	**8**	**11**	**14**	**17**	**20**	**23**	**26**	**29**	**32**	**35**	**38**	**41**	**44**	**47**	**50**	**53**	**56**	**59**
Teacher talking	✓	✓	✓	✓	✓	✓									✓	✓	✓			
Student (one) talking (presenting)											✓	✓	✓	✓						
Buzz (many students talking)						✓	✓	✓	✓											
Noise (task related)										✓										
Noise (disturbance)																				
Nothing related to lesson																				
DOING ON-task (one)	**2**	**5**	**8**	**11**	**14**	**17**	**20**	**23**	**26**	**29**	**32**	**35**	**38**	**41**	**44**	**47**	**50**	**53**	**56**	**59**
Assisting students (helping)																				
Listening	ABC	C	C	B	B						BC	ABC	ABC	ABC						
Note-taking		AB	AB	A	A										ABC	ABC	ABC			
Observing practice																				
Practizing (or working)																				
Reporting/reciting											A									
Taking test																				
Talking to student (one)																				
Talking to teacher																				
Working in group						ABC	ABC	ABC	ABC	BC										
Working on assignment																				
Writing on chalkboard (flipchart)																				
Other																				
DOING OFF-task (one)	**2**	**5**	**8**	**11**	**14**	**17**	**20**	**23**	**26**	**29**	**32**	**35**	**38**	**41**	**44**	**47**	**50**	**53**	**56**	**59**
Daydreaming																				
Playing				C	C															
Talking																				
Walking around																				
Waiting										A										
Other																				

Questions - how good are they?

Classify each question asked during the whole lesson.

Note some questions word by word. They can serve as examples.

Type of question	Number	Examples
Closed • yes/no • number • Who of you ...?		
Open - low level • **Recall:** Give the definition of .... • **Understanding:** How do you explain .....? Give me an example of ....? What is the contrary of ...?		
Open - high level • **Application**: Uses something learned in a new situation • **Analysis**: Dismantle something new, criticize something according to given criteria • **Synthesis**: Create something new (never seen before), put pieces together • **Evaluation**: Assess something new, even inventing the criteria *Observe: It has to be something **NEW!***		
Total Number		

Questions - how good are they?

Classify each question asked during the whole lesson.

Note some questions word by word. They can serve as examples.

Type of question	Number	Examples
Closed • yes/no • number • Who of you ...?		• Do you like to become a forest extension agent? • How many brother do you have? • Who of you speaks German?
Open - low level • **Recall:** Give the definition of .... • **Understanding:** How do you explain .....? Give me an example of ....? What is the contrary of ...?		• What is the definition of cement? • What are the symptoms of malaria? • How do you explain "global warming" to small children
Open - high level • **Application**: Uses something learned in a new situation • **Analysis**: Dismantle something new, criticize something according to given criteria • **Synthesis**: Create something new (never seen before), put pieces together • **Evaluation**: Assess something new, even inventing the criteria *Observe: It has to be something **NEW!***		• What will be the effects of global warming for the Mekong Delta? • What are advantages and disadvantages of high level participation of farmers in rural development? • What should be done to minimize the effects of global warming to the area of the Mekong Delta?
Total Number		

Debriefing

Answer the following questions:

1. How are learners involved in drawing the conclusions?

2. How do the conclusions relate to the results of the group work?

3. How are the key-points mentioned in the conclusion?

Criteria for Platform Skills

Observe two times about five minutes each, the first time rather at the beginning, the second time in the middle of the lesson.

Voice

Clear	Volume comfortable
Rate of speech	Variation in rate & volume
Pronunciation	Filler words
Pauses	

Vocabulary & language

Appropriate	Understandable
Correct	Technical terms explained

Body Language

Eye contact (3 seconds)	Friendly
Enthusiastic	Variation in facial gestures, expressions
Relaxed posture	Confident
Calm movement	Good positioning in the room

Criteria for Platform Skills

Observe two times about five minutes each, the first time rather at the beginning, the second time in the middle of the lesson.

Voice

Clear ✓	Volume comfortable
Rate of speech	Variation in rate & volume
Pronunciation ✓	Filler words
Pauses ✓	

Vocabulary & language

Appropriate	Understandable ✓
Correct ✓	Technical terms explained ✓

Body Language

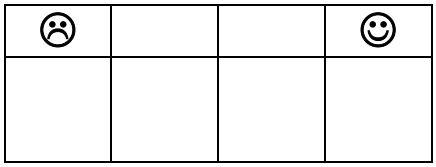
Eye contact (3 seconds) ✓	Friendly ✓
Enthusiastic	Variation in facial gestures, expressions
Relaxed posture ✓✓	Confident
Calm movement ✓	Good positioning in the room ✓

+		-
Calm *Warm tone* *friendly*	**Voice**	*Quite softly spoken. Voice seems to carry ???? In larger room?* *Talking while writing on the board*
Easy too understand, because explains technical terms with examples	**Language**	
Relaxed, open, engages well with participants - eye contact excellent! *Attentive - well in control without controlling* *Takes notes of students' contributions and later takes them up.*	**Body language**	*Visibly "thinking ahead" when getting a response and looks where to fit it in on the board.*

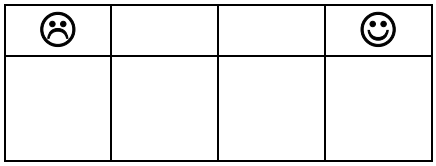
Assignment

After the lesson the students are to fill in the following boxes.

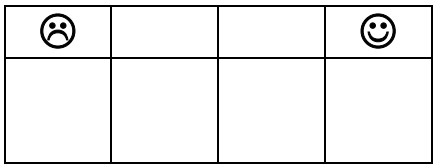
The assignment was clear.



The assignment was interesting.



The assignment was helpful for learning.



Assignment

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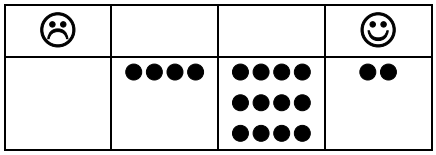
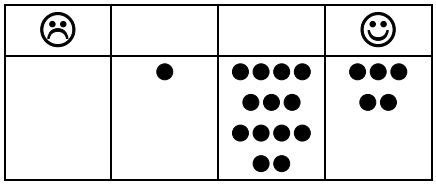


The assignment was interesting.



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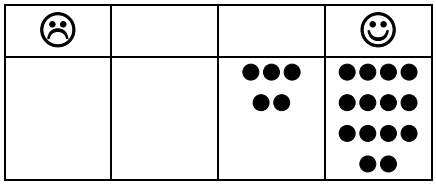


Section D:
Facilitation Skills for Rural Development

Why facilitation skills for University teachers?

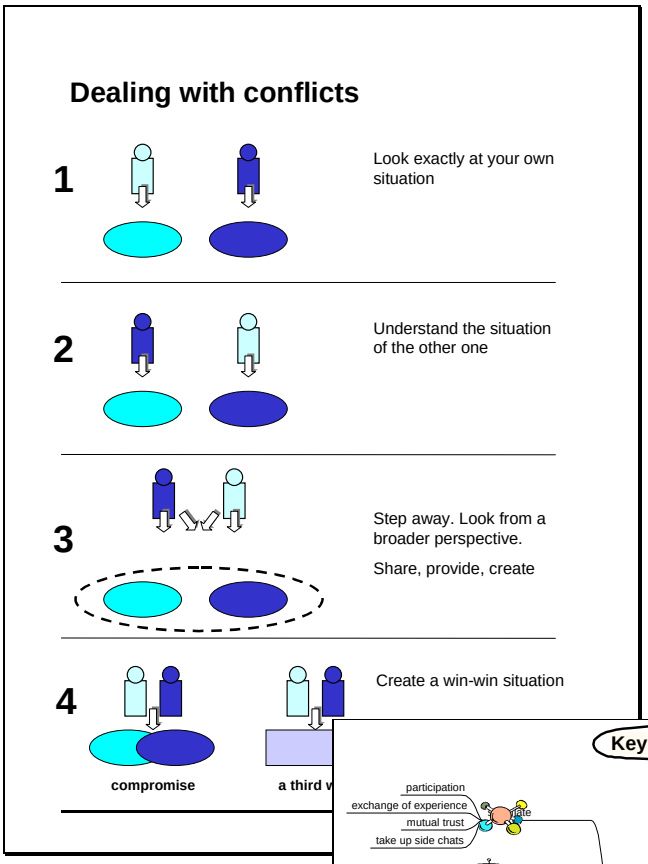
The time students and teachers spend together in the "field" is always a special opportunity for the teachers to serve as role models for the real working situation of the learners. Through their behavior towards farmers and communities, the teachers can show what participation actually means. The way of talking about and with farmers reveals the real attitudes.

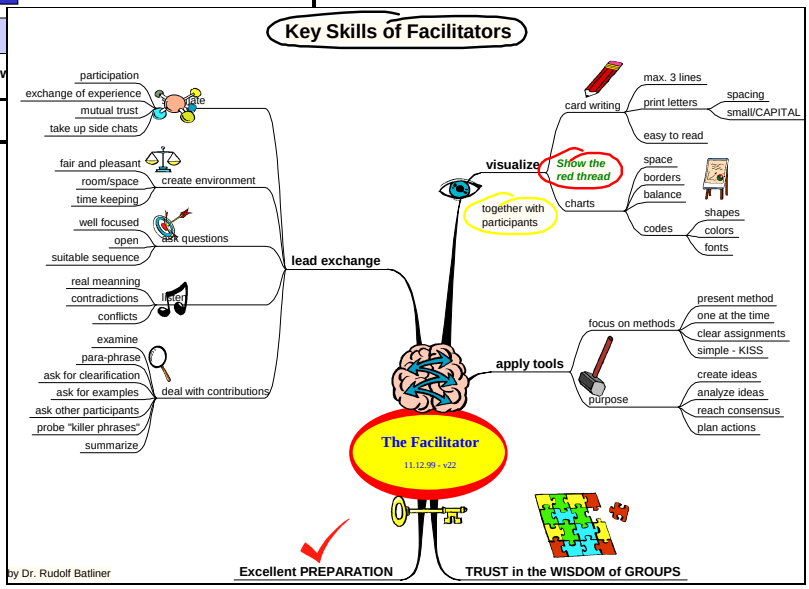
For instance modeling participation by conducting a village meeting is much more effective than giving a lecture on participatory village meetings or handing out guidelines. A good way of teaching would be a combination: modeling, talking about it with the students and finally asking them to draw conclusions by creating guidelines for participatory village meetings. The same is true for conducting interviews or for facilitating small group discussions as well as for applying any PRA tools.

Learner Centered Teaching Methods and Facilitation Skills have many similarities and a few, very important differences, of course.

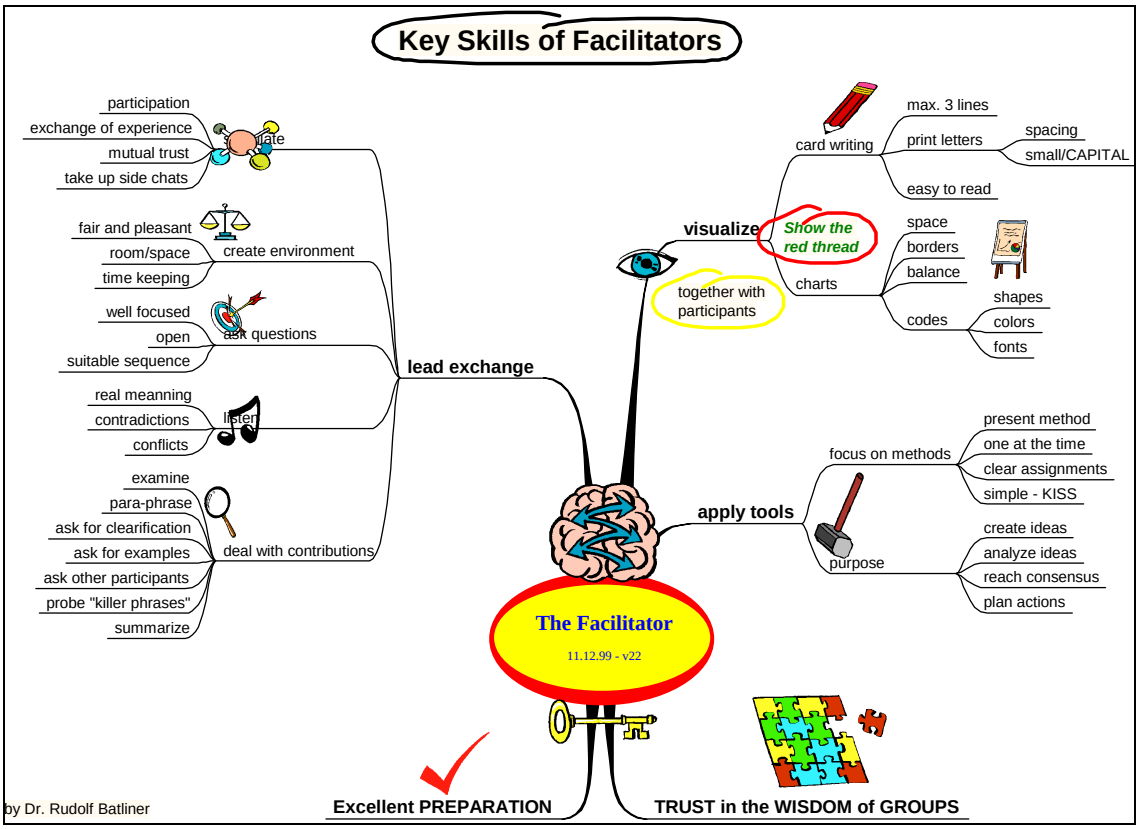
Similarities	Differences
• Positive attitudes towards farmers or students • Clear leadership without dominating the situation • Meaningful topics and assignments • Good questioning and careful listening	• Teachers know more than the students do, sometimes farmers know much more than the extensionist does. • Teaching often consists of conveying information, facilitation always of exchange of experience and criteria and/or solving problems

D1 Handouts


Dealing with conflicts
1
Look exactly at your own situation
2
Understand the situation of the other one
3
Step away. Look from a broader perspective.
Share, provide, create
4
Create a win-win situation
compromise
a third v

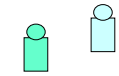

Key Skills of Facilitators
participation
exchange of experience
mutual trust
take up side chats
fair and pleasant
room/space
time keeping
create environment
well focused
open
suitable sequence
ask questions
real meanning
contradictions
conflicts
examine
para-phrase
ask for clearification
ask for examples
ask other participants
probe "killer phrases"
summarize
deal with contributions
lead exchange
visualize
card writing
max. 3 lines
print letters
spacing
small/CAPITAL
easy to read
Show the red thread
charts
space
borders
balance
codes
shapes
colors
fonts
together with participants
apply tools
focus on methods
present method
one at the time
clear assignments
simple - KISS
purpose
create ideas
analyze ideas
reach consensus
plan actions
The Facilitator
11.12.99 - v22
Excellent PREPARATION
TRUST in the WISDOM of GROUPS
by Dr. Rudolf Batliner

The Facilitator

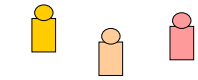


The Facilitation Process

Facilitation Process



The five stages of facilitating meetings and workshops



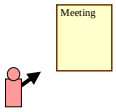
Warming up

Purpose

- ⌘ create feeling of safety
- ⌘ focus group on topic
- ⌘ reach readiness for work

Activities

formal opening, clarification of objective(s), personal presentation, easy starting activity, creation of ground-rules, expectations and fears, advanced organizer, ice-breaker



Selecting topics

Purpose

- ⌘ agree on relevant topics
- ⌘ make time budget
- ⌘ create structure
- ⌘ share responsibility

Activities

open agenda, topic storage, time estimation, ranking of topics (urgent, important)

Analyzing topics

Purpose

- ⌘ describe situation
- ⌘ find reasons, causes and effects
- ⌘ generate ideas
- ⌘ assess ideas
- ⌘ take decisions

Activities

2-fields chart, 4-fields chart, mekong, 5 why, SWOT, brainstorming, Phillips xyz, pair-wise ranking, mood-o-meter, multi-voting, needed-wanted-do-able

Planning action

Purpose

- ⌘ convert discussion to action
- ⌘ define procedure
- ⌘ set deadlines
- ⌘ assign responsibilities and resources

Activities

Action plan, GANTT chart

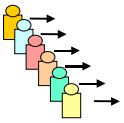
Winding up

Purpose

- ⌘ evaluate process and outcome
- ⌘ give an outlook
- ⌘ create commitment

Activities

Mood-o-meter, one-dot, 2D-one-dot question, flashlight, individual reflection, group reflection

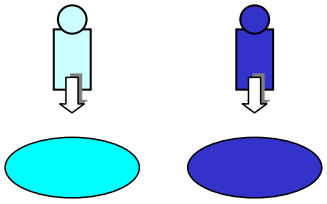


think - talk - praise

Dealing with Conflicts

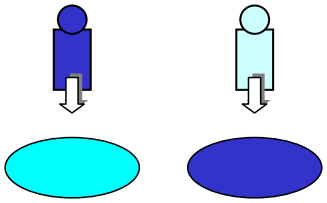
Dealing with conflicts

1



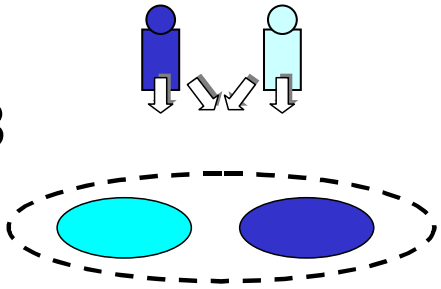
Look exactly at your own situation

2



Understand the situation of the other one

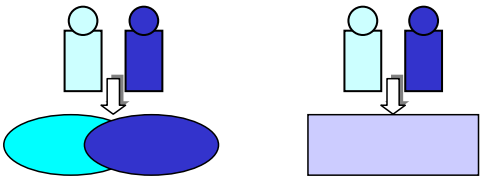
3



Step away. Look from a broader perspective.

Share, provide, create

4

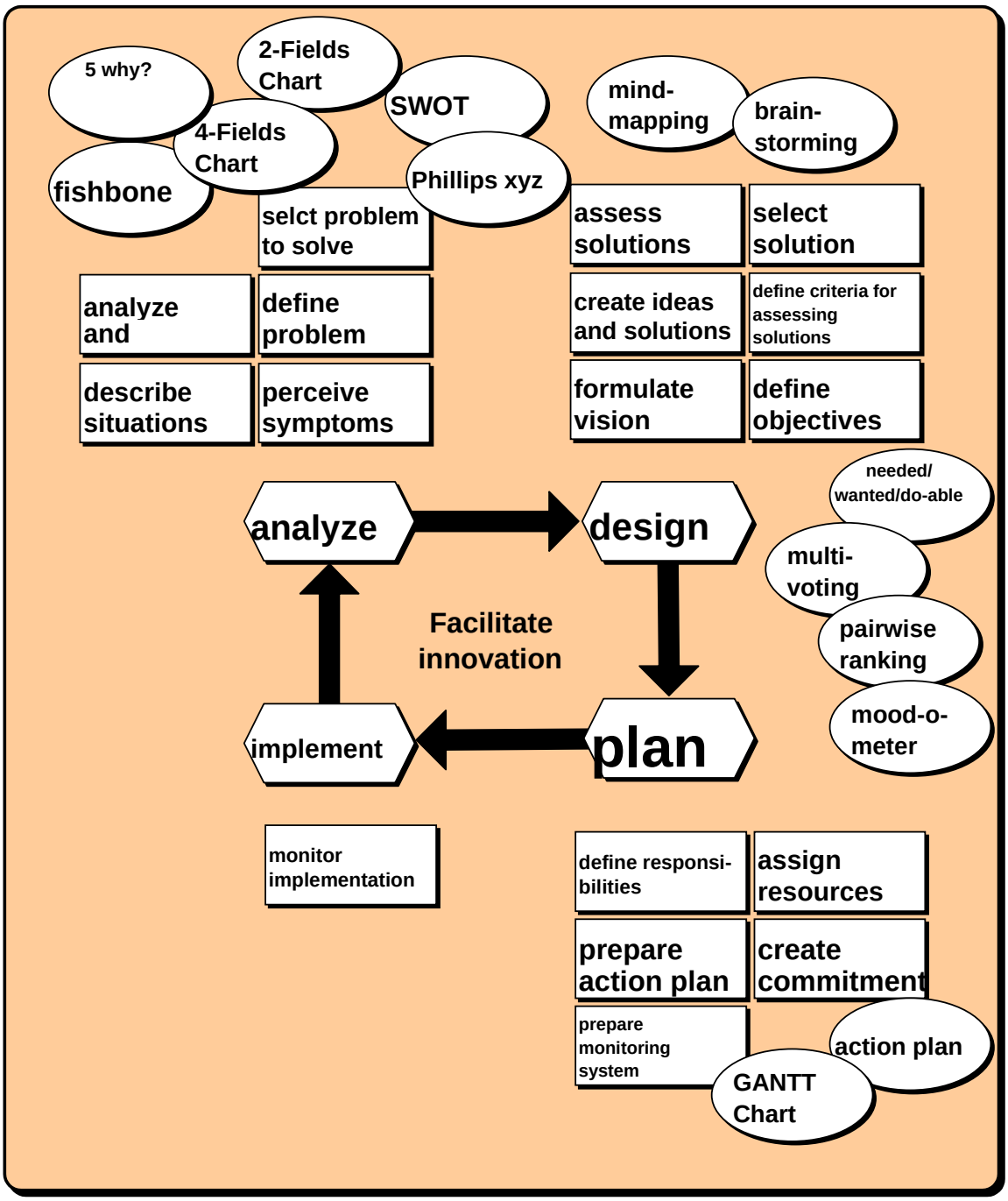


compromise

a third way

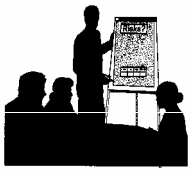
Create a win-win situation

Facilitate Innovation



D2 Skill Cards

Moderation – A Process for Facilitating Teamwork



Introduction

Effective communication, team work and problem solving are so-called key qualifications that are becoming increasingly important for many occupations. They are best trained in a learning set-up that allows trainees to solve problems in a team and to express opinions, experiences and feelings in a constructive way. Moderated sessions provide that set-up. This Card presents the basic concepts of the moderation method. It is supported by several "how to do" Skill Cards.

What is moderation?

Literally the Latin word "Moderatio" means "right measure" or "harmony". Some verbs to describe moderation would be: develop, animate, help, support, encourage or facilitate.

Today, the moderation method is characterized by three aspects:

- specific attitudes of the moderator(s),
- teamwork according to a specific methodology,
- use of special media and materials.

The moderation method is based on the "wisdom of the group". It is used in workshops, meetings of project teams, quality circles, staff meetings, planning exercises, etc.

Moderation works where all team members can contribute. It does not work, when participants lack of knowledge or experience related to the topic to deal with.

The size of the group can vary, ideally it is 5 to 9 persons. Larger groups are regularly split up into sub-groups.

The Moderator

Moderators often work in teams of two, alternating the leading of the discussion with other tasks like recording or observing the group interactions. This applies specially for workshops and meeting of a longer duration.

Favorable Attitudes and Behaviors

The moderator ...

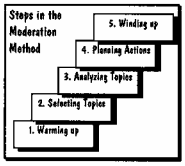
- withholds with his/her own opinions. He/she does not judge the contributions of others.
- shows an attitude of questioning and not of insisting. By asking questions he/she acti-

Concept Card©

Moderate Sessions – Analyzing Topics

Introduction

In the moderation method "Analyzing Topics" is third step.



Objective

For steps 1 and 2 of moderation, the selection of methods are very much linked to the time available. In the this step, the objective of the meeting is the most important criterion for choosing the methods. The objective could be:

- information collection and exchange
- problem analysis and solving
- preparation of data for decision makers
- decision making

Methods

The methods have to give the participants the opportunity to analyze themselves the topic or problem down to the required depths. They should get a deep feeling of understanding and ownership. In this step, the total group is often split up into sub-groups. This speeds up the process, because the subgroups can deal with different aspects of the problem at the same time. But the use of sub-groups requires a cautious debriefing.

Method 3.1: Brainstorming

What for: "Brainstorming" is used very often in moderation. It helps to generate ideas and to involve everybody.
Advantage: Many people are familiar with it.
Disadvantage: Less experienced moderators might face difficulties in further processing the many contributions.
How: There is a Skill Card on "Brainstorming" that explains the procedure. In moderation, the ideas are recorded on cards and immediately pinned on the board. Therefore, it is helpful to appoint one or two recorders.

Method 3.2: Two Field Table

What for: The "Two Field Table" is used primarily in small groups to focus, for a short moment, on a problem and obtain the first tentative solutions which might be further analyzed later.
Advantages: It is easy to handle and has a simple and clear structure (KISS-principle).
Disadvantages: Sometimes lacks

Course for Teaching Aids

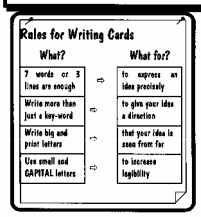
Pros	Cons
•	•
•	•
•	•
What's unclear	**What's next**
•	•
•	•
•	•

NOTE: The same format can be used for many purposes. One of the most common is the so-called "SWOT-Analysis" (SWOT =

Skill Card©

This is Good Lettering

1 unit
2 units
1 unit



Composing Charts

The charts determine to a great extent the output of a moderated event. It's worthwhile to design them carefully. Be creative, but do not exaggerate. All charts should reflect the same "style. "

- **First, define the objective** of the chart and the kind of information you want to give yourself or the participants to elaborate.
- **Take into account reading patterns**. Write and compose from left to right and from top to bottom.
- **Put only one question or unit of meaning per chart.** Like the cards, the charts can be rearranged.
- **Write the title of the chart in the upper left corner**. Make a cloud around it.
- **Create clusters** of cards **or blocks**. Blocks are easier to perceive as units than long lines over the whole chart.
- **Pin related cards close to each other.** Separate not related cards clearly.
- **Leave enough free space between clusters.** This isolates ideas and allows new ideas and comments to be added.
- **Leave space of ~1 cm between the cards**, when designing a matrix or a linear sequence. This creates contrast and separates ideas. If afterwards lines are required, you can draw them in-between.
- **Use the collage technique.** Move the cards by pinning them till you get a good result.
- **Draw lines directly on the brown paper** as frames for the clusters or connecting lines between cards.
- **Emphasize with symbols** but don't produce visual noise! ! ➔ ●⇔
- **Test the effect** of the chart before gluing the cards. Look at it from the viewpoint of the participants and get their approval.

Presenting Charts

Charts should explain themselves and not require many words. A presentation according to the following rules might increase their effectiveness:

- Stand on one side of the board.
- Face the audience.
- Point at the concerned card with the hand that is nearer to the board.
- Read everything aloud. Some cards might be difficult to read from a far distance.
- Pause for effect. Do not kill people's thinking by long explanations.

Conclusion

Visualization is the handicraft of the moderator. Without a certain level of craftsmanship, moderation will hardly be successful. Legible writing improves communication. The design of the charts has a direct influence on the form (and content) of the outcome. A proper presentation style increases the effectively of the charts.

Performance Checklist

Did the moderator ...	yes	no
• use colors consistently according to their meaning?	❑	❑
• use symbols and free space accordingly?	❑	❑
• write according to the rules?	❑	❑
• observe reading patterns in the design of the charts?	❑	❑
• design all charts in the same style?	❑	❑
• put only one unit of meaning per chart?	❑	❑
• present the charts properly?	❑	❑

All items should be marked "yes"

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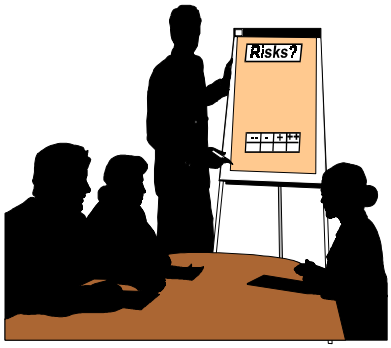
Moderation – A Process for Facilitating Teamwork



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The size of the group can vary, ideally it is 5 to 9 persons. Larger groups are regularly split up into sub-groups.

The Moderator

Moderators often work in teams of two, alternating the leading of the discussion with other tasks like recording or observing the group interactions. This applies specially for workshops and meeting of a longer duration.

Moderator Tasks

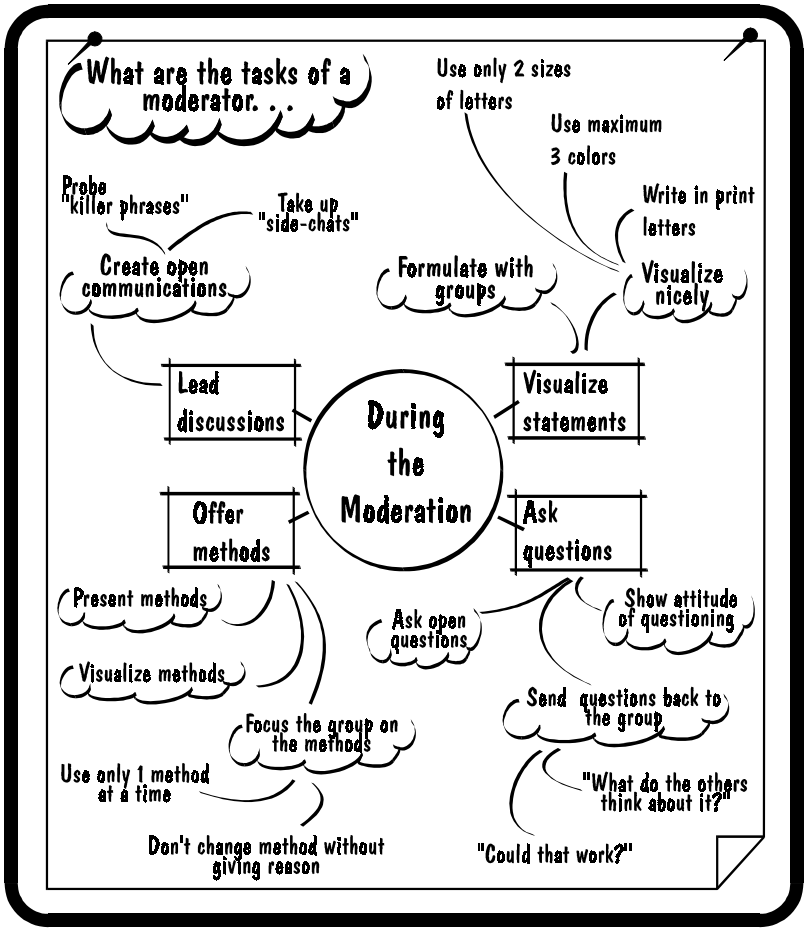
The moderators are the persons who are responsible for structuring and guiding the group process. They are experts in methodology, but not specialists in the subject matters. Therefore, they are responsible that the group members cooperate well and that the results reflect the consent of the group. They are not responsible for its technical quality and therefore do not judge whether the statements or the end-results are right or wrong.

Favorable Attitudes and Behaviors

The moderator ...

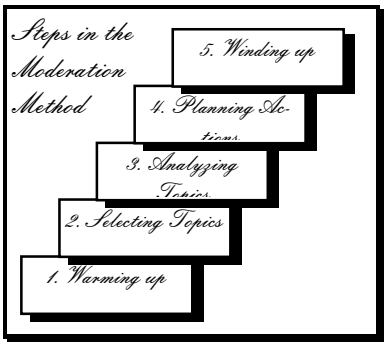
- withholds with his/her own opinions. He/she does not judge the contributions of others.
- shows an attitude of questioning and not of insisting. By asking questions he/she activates the group and starts the group working together.
- does not discuss about the method. He/she applies it.
- is aware of his/her own attitudes towards people and the topic. He/she knows his strengths and weaknesses.
- tries to make participants aware of their behaviors without judging them, helping them to understand difficulties and conflicts.

The moderator has done a good job, if at the end the group says: "We have done it ourselves!"



Methodology

The Moderation Steps



A moderation consists of five steps. Each step builds systematically upon the previous one. The first and the last steps focus on the process. The steps in-between deal with the content to discuss.

The whole process may last from a few hours to several weeks. In longer moderations reflecting on the process should take place more often, specially when motivational or interpersonal problems arise.

Step 1: Warming up

The functions of "Warming up" are to:

- formally open the session,
- create a positive working and learning climate,
- clarify the expectations and anxiety of the participants,
- orient about objective and methodology.

Step 2: Selecting Topics

"Selecting Topics" includes:

- creating a common starting point,
- obtaining from the participants possible topics, ideas and questions related to the objective,
- structuring the outputs by grouping them into clusters,
- agreeing upon the topic(s) to be discussed and analyzed and to their sequence.

Part 3: Analyzing Topics

In "Analyzing Topics," the participants work on the specific, agreed upon topics. The methods are chosen according to the purpose of the event, which could be for example:

- information collection and exchange
- problem analysis and solving
- preparation of data for decision makers
- decision making

Part 4: Planning Actions

In the long run, discussions without further actions turn out frustrating. The action plan defines who does what till when. Often the means are determined as well (how). The action plans should be realistic and achievable. The responsibilities should be clearly stated.

Part 5: Winding up

"Winding up" reflects back on the group process with questions like:

- To what extent have my expectations been met?
- Did I experience the work as effective?
- How much am I satisfied with the result?
- How well did I feel in the group?

Questions - the key for steering the process

Effective questioning is an elemental skill for moderating, because questions allow the moderator to:

- involve all participants,
- make transparent, the knowledge, experience and feeling of the group members,
- agree upon working parts and methods,
- make transparent, the group climate,
- obtain consent within the group.

A good moderator is capable of asking questions and handling the questions of the participants. He/she knows that questions always have two components: the content (factual information) and the form (the relation between persons).

A Skill Card is available on oral questioning.

Media and Materials

Visualizing is another key-skill of a moderator and is closely linked to media and materials. Visualizing makes sure that all contributions are recorded and serve as elements for further mental associations. A good visualization reflects the arguments and their development.

The main media and materials are:

- pinboard, pins and large charts
- flip chart
- cards of different colors, sizes and shapes
- felt pens of different colors and sizes (if possible: chisel-tip type)
- glue and adhesive tape
- scissors and paper knife
- if possible, adhesive dots of different shapes and colors.

Conclusion

Moderations need to be prepared carefully and in detail. Particularly important are the clear formulation of the questions and the design of the charts. Questions and charts are the main means for steering the process. They are the lesson plans of effective moderation sessions.

The moderation method builds on trust and confidence and in the good intentions and capabilities of the participants. Therefore it requires from the moderator the modest attitude of a helper or even a servant. For a professional teacher or instructor who is used to playing the main role in the classroom, it might be difficult to withdraw from the front stage. But for somebody who is interested in the learning of the students, he/she will probably be very satisfied with the outcomes of properly moderated sessions.

Moderate Sessions – Getting Prepared

Introduction

The success of any moderation depends highly on the preparation. Five areas need to be considered:

- familiarize with the content,
- think about participants,
- develop methodology,
- assure proper organization,
- be personally fit.

Even before starting preparation the moderator should seriously assess if he/she is the right person to moderate the event. There might be a lack of acceptance of the outcomes by the participants, because from their viewpoint the moderator is:

- not neutral (him/herself part of the problem or the solution),
- not experienced enough to deal with this difficult or conflictive topic,
- not on the right hierarchical level to be entrusted such a "hot" issue.

Content

Topics - Subject

The moderator is a specialist in methodology who steers the process mainly through questions. One can ask reasonable questions only if he has some knowledge about the subject. There is no need that the moderator becomes a specialist in the subject, but at least he should have an overview and understand the basic concepts.

Purpose & Objectives

To design a methodological concept, the moderator needs a clear purpose and objectives. Usually they are developed together with the customer. If some topics on the agenda are fixed before the meeting, the objective of each of them have to agreed upon.

Participants

The participants are the key-element of each moderation because they meet to deal with a topic or problem of their concern. Therefore, it is of utmost importance to find answers to questions like:

- Who will participate?
- What might be their individual interest?
- Which attitudes do they have towards the topic?
- How is their relation with me as moderator?
- What problems and conflicts might come up?
- How much experience do they have with the moderation method?

It might be necessary to think about special activities to "pick up" the group, where it is. For example:

- to plan much time for the warming up if the group lacks of experience with the moderation method.
- to propose special "rules of the game", if the topic is full of potential conflicts among the participants.

Methodology

Moderation Plan

Planning a moderated workshop is like "planning the unplannable" or making a weather forecast, because the moderator cannot predict exactly what will happen. On the other hand, the success depends on the quality of planning.

The moderator plans the process step-by-step. He/she chooses methods according to people, objectives and time. Possible questions and type of charts are thought about. For delicate meetings, it is advisable to have a "Plan B", an alternative procedure for the steps in selecting and analyzing the topics.

Like a lesson plan, a moderation plan format is a useful tool for planning and preparing the meeting or workshop as well as useful during the event. It helps to keep on the track. On the backside of this Skill Card is an example.

Visualization

Besides questioning, visualization is the most important tool for structuring a facilitated meeting. Some charts and cards can be prepared before according to the methodology.

Organization

The extent of the organizational preparation depends on the group, the topic, the methodology and the time frame. In any case the following list of items should be checked.

Timing and Time-frame

- ☑ When should it take place?
- ☑ How long is the duration?
- ☑ How many breaks and when?

Location

- ☑ Where should it take place (internal/external)
- ☑ How many rooms are required (for total group and sub-groups)
- ☑ What size of the rooms?
- ☑ Which media are available?
- ☑ What about outlets for electricity?
- ☑ Are tea and snacks available?

Invitation

The participants should be informed as early as possible. The invitation usually contains the following information:

- ☑ time/time-frame
- ☑ location
- ☑ topic/purpose
- ☑ participants
- ☑ moderato(s)
- ☑ person who invites

Moderation Material

Below is a checklist of required moderation materials.

Personal Preparation

To facilitate a meeting or a workshop of several days requires a lot of concentration and therefore fitness. Light meals and avoidance of alcoholic drinks help to keep body and brain in good working conditions.

It is useful to mentally go through the moderation plan and imagine how things will happen. This helps to improve the planning and the implementation.

The moderator should get acquainted with the facilities before, because each place has its own atmosphere that can be facilitative or hindering for the working climate. Being in time and on-the-spot is like having a "home-match".

Moderation Plan

Step	Objective	Methodology	Materials	Time	Moderators
Complete moderation	make action plan for the development of course on community development	full moderation procedure	1 moderation kit 5 pinboards 1 flipchart pre-prepared charts	~ 3 hours	team A+B
Warming up	opening good working climate focus towards topic	one dot question on interest in topic	pre-prepared chart: - visualized question	15'	A opens B asks question
Selecting topics	present request and work done up to now list aspects also to be considered fix sequence of topics	director informs card question problem storage simple "dotting"	flip chart for director pre-prepared chart: - visualized question	60'	A moderates, B records
Analyzing topics	analyze prioritized topics generate ideas and hints	4 field chart for each topic (in sub groups)	pre-prepared charts: fields still to decide	45'	B moderates
Planning action	establish action plan for implementing solution	action plan: careful with time indications!!!!	pre-prepared chart: - action plan matrix	30'	A moderates, B records
Winding up	assure ownership evaluate process and satisfaction with result	2 dimensional one dot question	pre-prepared chart: - 2 dimensional question	10'	B moderates

List of Materials

Type of Material	Quantity
pinboards	1 per 2 participants
brown pinboard charts	2 per participant
cards (size: 10x21 cm, 4 colors)	20 white and 10 each of other colors per participant
chisel tip marker black	1 per participant
chisel tip marker red & blue	2 per moderator
thick markers (black, blue, red)	1 per color
if available: stickers, ∅ ~9 mm	20 per participant
glue sticks	2
scissors	1
masking tape - 3 cm	1 roll
pins	more than 100

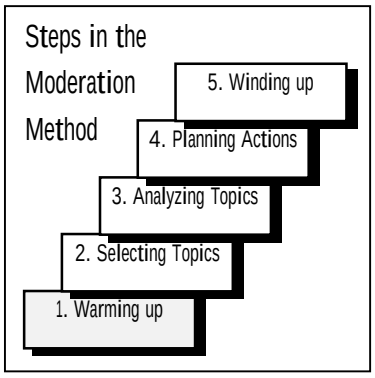
NOTE: Make sure that you have a stock of spare materials, specially markers for participants and white cards.

Performance Checklist

Did the moderator	yes	no
• check his/her acceptance by the participants?	❑	❑
• fix the objectives with the customer?	❑	❑
• get prepared content wise?	❑	❑
• analyze the characteristics of the participants?	❑	❑
• prepare a detailed moderation plan?	❑	❑
• design all possible pre-prepared charts?	❑	❑
• assure timely invitation?	❑	❑
• check the rooms ahead of time?	❑	❑
• bring along the material according to the material list?	❑	❑

All item should be marked "yes"

Moderate Sessions – Warming Up



Introduction

Warming up" is the first step in the moderation. This Skill Card deals with the objectives of "warming up", shows an often used procedure with several steps, and describes some suitable methods.

Objectives

In every moderation group at the beginning, people feel uncertain about what will happen and whom they will have to deal with. Informally the participants adopt roles and "create" rules for cooperation. This is very natural and a necessary process in order to make the group functional. For creating a positive dynamic, it is advisable to steer these processes consciously.

At the end of the step " warming up" the participants...

- feel at ease with each other,
- have a clear idea of what to expect in terms of content and process,
- are ready for work.

Procedure and Methods

"Warming up" is done step-by-step. For each step we explain the functions. Many steps are illustrated by the description of suggested methods and examples of charts.

Opening of the Session

Functions

- Start officially the work with the group
- Agree upon overall time frame
- Introduce participants and moderators to each other
- get acquainted with the room and the facilities
- Create a good working climate

Methods

Method 1.1: Group Mirror

We about ourselves

Name	Function	Here, because ..	Typical for myself
D.P.Kafle	Instructor	improve skills	speaks a lot
R.B.Chetri	Ass.Instr.	lesson planning	likes jogging
K. Sharma	Trainer	impart sessions	good singer

Chart 1.1: Group Mirror

What for: The "Group-Mirror" helps to present the participants.

Advantage: It requires a short time only and therefore is also suitable for short meetings. **Disadvantage**: Participants do not talk to each other.

How: The moderators present to the participants a pre-prepared pinboard with the visualized structure of the "Group-Mirror". The headings correspond to the specific group. It is always advisable to have one column for personal/emotional contributions to show that the persons and the topic are important.

Everybody writes his information on the chart while presenting himself. A variation could be to give some minutes for an interview with the partner and then the partners present each other.

In the case of short meetings the participants can write their information on the board even before it starts officially. Distributing cards that everybody can write at the same time, would be another time-saving variation.

Method 1.2: Wanted

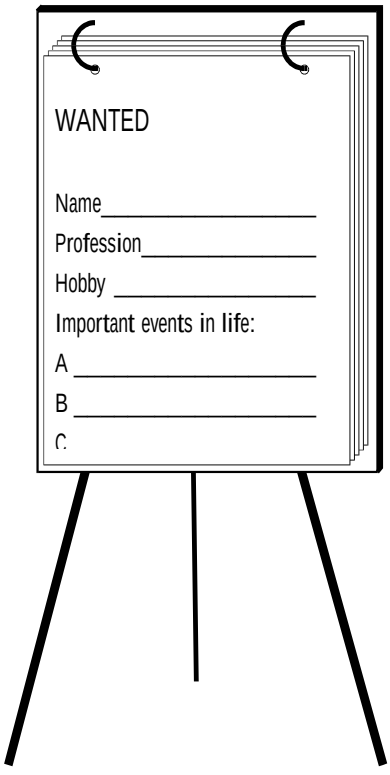
What for: "Wanted" is a method for presenting participants and for warming up. As it takes quite some time, it is specially used for workshops of several days.

Advantage: The participants talk together, which increases trust and openness.

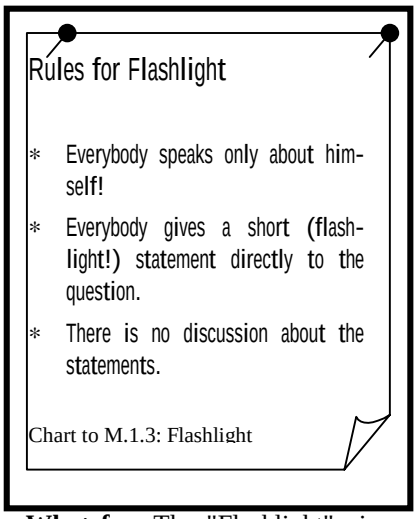
Disadvantage: Requires much time

How: The moderators present the chart with the pre-prepared structure that fits the group. It is important that not all items are related to the job. Each participant and the moderators take one chart and draw their personal "WANTED" chart. Then they present it personally. Others may ask questions.

A variation is to work in pairs for about 15 minutes. Then, the teams visualize the results in the form of the "Wanted" Poster. At the end, everybody presents his partner or himself to the group.



Method 1.3: Flashlight



What for: The "Flashlight" gives each participant the chance to express his present feeling to questions like:

- How do I feel right now?
- What was I thinking about on the way here?
- What would I expect from this event?

How: The moderator explains the "rules of the game". In new groups they even should be visualized on a chart.

Then the moderator formulates the precise question. The order of the contribution can be according to the seats or free. The moderator(s) is part of the group.

NOTE: This method can be used at any time during the process to clarify emotions or to motivate the participants to contribute to clear-cut questions.

Clarifying Expectations

Functions:

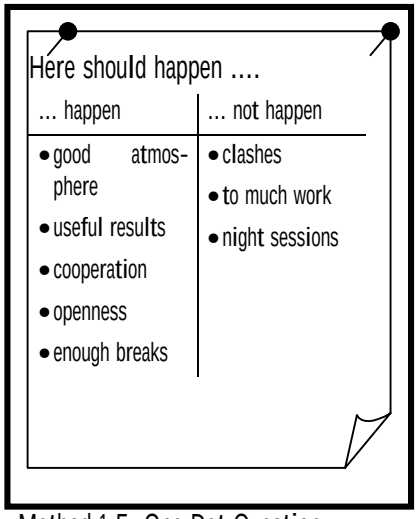
- Get to know expectations, concerns and eventual anxiety
- Agree upon rules of cooperation

Methods

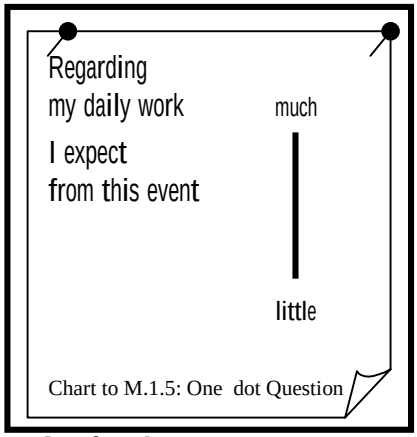
Method 1.4: Call out Expectations

What for: Participants and moderators get a picture of the expectations, reservations or even fears regarding the starting cooperation and can adjust to them. Possible tension between people are verbalized.

How: The moderator presents a pre-prepared chart with a sentence to be completed. The participants give statements and the moderator or a participant record the contributions on the chart.



Method 1.5: One Dot Question



What for: the "One Dot Question" is always useful to get the opinion of all participants. As everybody has only one dot and the dots look very much the same, each opinion has the same weight regardless of the position of the author.

How: The moderator presents the pre-prepared chart with a clear question. Each participant my make one dot with his marker.

Afterwards the participants are invited to give oral comments. Those are recorded (and never commented) by the moderator.

NOTE: The "One Dot Question" can be used in many situations during the cycle. The question has to fit the specific situation.

Fixing Objectives

It is of utmost importance that the participants are clear about the purpose of the meeting. This is especially true when some people have been forced to participate or were not properly informed, hidden or even open conflicts might arise. It has to be clear to everybody, if the purpose is to:

- exchange experiences or information,
- analyze a problem,
- explore and propose solutions,
- make a decision,
- a combination of the above.

Informing about Process

Participants feel safer knowing what is expected of them. Therefore the moderator gives a overview on the planned steps. A useful model is the "moderation steps" with additional information about timing, (tea) breaks, etc.

Agreeing upon Minutes

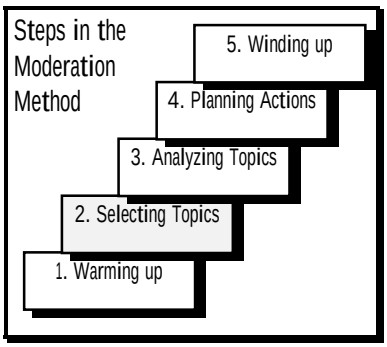
Often sessions without proper minutes do not lead to action. There it is necessary to clarify how the minutes should look and who will write them by when.

Performance Guide

Did the moderator	yes	no
• introduce the participants and himself?	❑	❑
• allow the participants to express their expectations	❑	❑
• get an agreement about the purpose of the meeting?	❑	❑
• make the participants feel at ease with the process?	❑	❑
• get appointed a minute's writer?	❑	❑
• create a stimulating climate?	❑	❑

All items should be marked on "yes".

Moderate Sessions – Selecting Topics



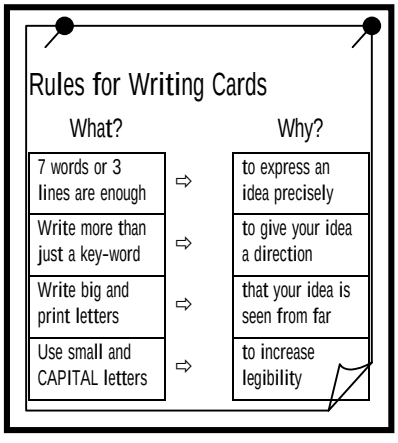
Introduction

"Selecting Topics" is the second step of the moderation method. This Skill Card deals with the objectives of " Selecting Topics", shows often used procedures, and describes suitable methods.

Objectives

"Selecting Topics" is the first step in the moderation process that focuses on the content of the meeting or the workshop. At the end of this step, the participants have:

- gained a common starting point,
- suggested possible topics, ideas and questions related to the purpose of the meeting
- structured the ideas under major headings.
- agreeing upon the topic(s) to be discussed as well as their sequence (or priority).



Procedure and Methods

If the participants still do not have experience in writing cards, at the beginning of this step they should be given some hints on how to write cards. The hints or "rules" can be visualized on a chart.

As in Brainstorming, generating and agreeing upon the topics is best broken up into different steps.

Generating Topics

Functions

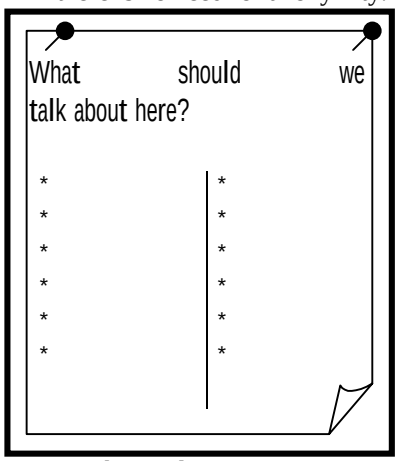
- Focus the attention of the participants on the common goal,
- Get ideas from the participants,
- Create an overall picture of the topic.

Methods

Method 2.1: Call out Question

What for: "Call out Questions" are indicated when ...

- many creative and unusual ideas are required,
- mutual stimulation of mental associations is desired,
- there is no need for anonymity.



How: The moderator prepares one or two charts. One has the precise question in the upper left corner. He asks the team members to call out their ideas as they come up. The second moderator records the contributions one by one.

NOTE: Do not judge the contributions at the early stage of the process. Even positive feedback might be misinterpreted by those who do not get any reaction from you.

Method 2.2: Card Question

The "Card Question" is a suitable method when:

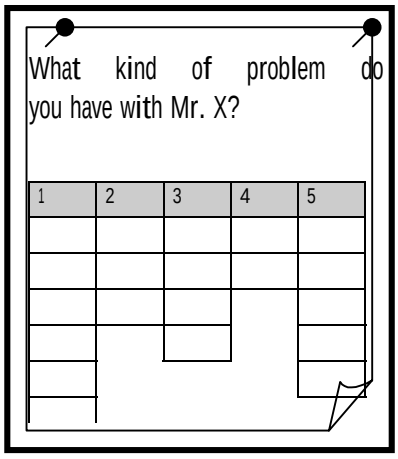
- time for reflection is needed,
- anonymity is vital,
- frequency of ideas is important,
- the process of clustering that follows in the next step is very important for understanding the problem.

How: The moderator distributes cards and markers. He asks to use one card for each idea. All cards have the same color and size. Usually, the number of cards is not limited. When there is not enough time, the group is asked to write all ideas, but to give back only the 3 (or ....) most important cards.

After collecting the cards the moderator shuffles them and sorts them in clusters with the help of the group on pinboard according to the content. The moderator reads out every card and the group decides which cluster they match with. If there are different opinions on where to put it, the card is duplicated and pinned in both clusters.

After this preliminary card sorting, a second run is made. All cards are read again, one by one. Where there is objection against , this is marked with a flash symbol.

When all cards are clustered, each cluster gets a heading and a number. The heading should be more than a catchword. It is better formulated in a short sentence.



NOTE: Do not throw away any card, even if the group asks for it. Each card is part of the process and the writer had his intention.

Selecting Topics

Functions

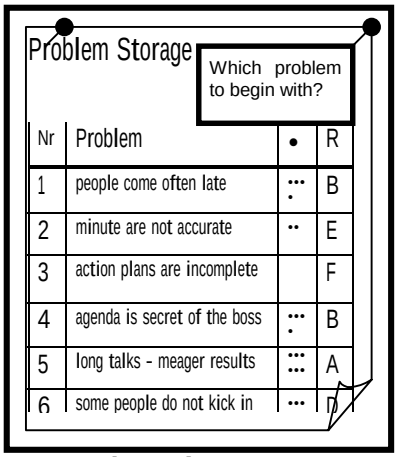
- Create an overview of the problems,
- Rank problems according to priority for analyzing them,

- Agree upon an agenda.

Methods

Method 2.3: Problem Storage

What for: In the "Problem Storage" all problems, topics, wishes are recorded, regardless of which method generated them. The problem storage will serve as the group's memory throughout the session(s), upon which they can orient themselves.



Nr	Problem	•	R
1	people come often late	•••	B
2	minute are not accurate	••	E
3	action plans are incomplete		F
4	agenda is secret of the boss	•••	B
5	long talks - meager results	•••••	A
6	some people do not kick in	•••	D

How: The moderator prepares one or two charts like the one above. The headings of the clusters are written in the boxes below "problem". At that moment, it is worthwhile to check if the problems are stated clearly (more than just one word).

As not all problems can be dealt with at the same time, they are prioritized now by applying the following procedure.

First, it is important to find the right question. It makes a big difference, if you ask: "Which is my most important problem?" or "Which problem should we begin with?" or "Which is the problem most easy to solve?"

The question should be clear to all participants. As it is so important, it is written on a card and pinned next to the upper boarder of the board. The moderator gives everybody the same number of small, round stickers or assigns to everybody the same number of dots (done with the marker). Each participant gets half as many stickers as there are problems. He puts his stickers (= votes) into the boxes below the column with the "dot".

The participant has the chance to distribute the stickers freely, putting only one sticker per box, or accumulating several stickers in one box to show his special interest in that particular problem.

NOTE: Voting is a partially anonymous activity. Therefore the moderators do not observe who is prioritizing what and how. They also do not try to identify the authors of the dots afterwards.

The moderator counts the votes and writes their number into the same box. Then he ranks the problems according to the numbers in column R, using letters (A, B, C,..) to avoid confusion with the first column.

Method 2.4: Multi-Voting

"Multi-voting" is another method for prioritizing items. It is useful when the number of items is very high (above 20). Voting is done in two steps with a discussion between the two.

In the first step everybody gets stickers for about one third of the number of problems and votes. This reduces the number of items considerably. Then the problems are discussed once more to make sure that everybody has the same understanding.

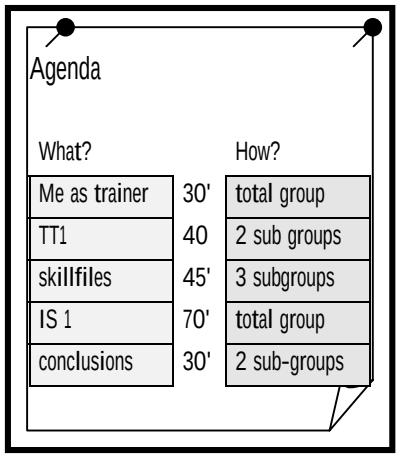
In a second step, the moderator asks for rating the remaining items on a scale from "1"(low) to "5" on a card that is placed in the same line as the problem.

Multi-voting takes more time than simple "dotting", but has the advantage of producing a more conscious result. It is useful in rather sensitive cases.

NOTE: The purpose of "dotting" and Multi-voting is to reach consensus!

Set Agenda

In longer workshops, it is useful to set the agenda with the tentative timeframe and the methods that will be applied. This helps the team to "see" the overall picture throughout the event. It could look like the chart below.



What?		How?
Me as trainer	30'	total group
TT1	40	2 sub groups
skillfiles	45'	3 subgroups
IS 1	70'	total group
conclusions	30'	2 sub-groups

Conclusion

"Selecting Topics" should always be used, even if the agenda is set. It creates ownership of the problems and group identity. Also, topics might come out that have to be addressed to achieve the objectives of the meeting.

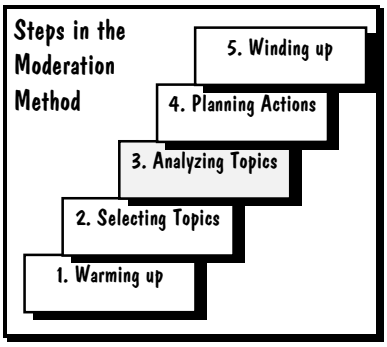
Performance Guide

Did the Moderator....	yes	no
• explain the rules for writing cards?	❑	❑
• write himself according to the rules?	❑	❑
• accept all contributions without judging?	❑	❑
• state the questions on the charts precisely?	❑	❑
• write headings that define the problem properly?	❑	❑
• get consensus through the voting procedures?	❑	❑

Moderate Sessions – Analyzing Topics

Introduction

In the moderation method "Analyzing Topics" is third step.



Objective

For steps 1 and 2 of moderation, the selection of methods are very much linked to the time available. In the this step, the objective of the meeting is the most important criterion for choosing the methods. The objective could be:

- information collection and exchange
- problem analysis and solving
- preparation of data for decision makers
- decision making

Methods

The methods have to give the participants the opportunity to analyze themselves the topic or problem down to the required depths. They should get a deep feeling of understanding and ownership. In this step, the total group is often split up into sub-groups. This speeds up the process, because the sub-groups can deal with different aspects of the problem at the same time. But the use of sub-groups requires a cautious debriefing.

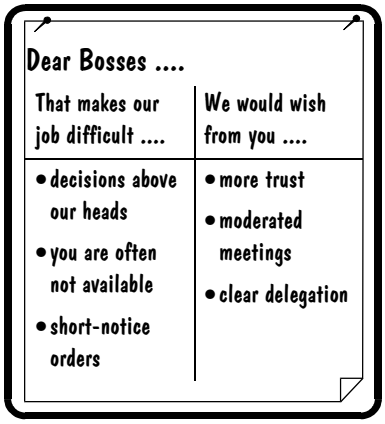
Method 3.1: Brainstorming

What for: "Brainstorming" is used very often in moderation. It helps to generate ideas and to involve everybody.
Advantage: Many people are familiar with it.
Disadvantage: Less experienced moderators might face difficulties in further processing the many contributions.

How: There is a Skill Card on "Brainstorming" that explains the procedure. In moderation, the ideas are recorded on cards and immediately pinned on the board. Therefore, it is helpful to appoint one or two recorders.

Method 3.2: Two Field Table

What for: The "Two Field Table" is used primarily in small groups to focus, for a short moment, on a problem and obtain the first tentative solutions which might be further analyzed later.
Advantages: It is easy to handle and has a simple and clear structure (KISS-principle).
Disadvantages: Sometimes lacks analytical depth because thoughts are very much directed by the two field criteria only.



How: The moderator presents the chart to the group. The headings depend on the problem. It is important to ask the group for specific answers. The group reacts by calling out or by writing cards. One moderators steers the process, the other records.

NOTE: Typical headings for other Two Fields Cards would be: "Pros & Cons" or "Strengths & Weaknesses", "Chances & Risks".

Method 3.3: Four Fields Chart

What for: The "Four Fields Chart" has the same uses, advantages and disadvantages and procedure as the "Two Fields Chart". Because of the two additional aspects, it allows to dig a bit further down into the issue.

Course for Teaching Aids

Pros	Cons
•	•
•	•
•	•
What's unclear	**What's next**
•	•
•	•
•	•

NOTE: The same format can be used for many purposes. One of the most common is the so-called "SWOT-Analysis" (SWOT = Strengths, Weaknesses, Opportunities and Threats). It helps to analyze the present situation (SW) and assess the possible future trends (OT). The SWOT chart is specially useful for assessing alternative solutions to a problem.

Method 3.4: Sequential Procedure

What for: This method is useful for analyzing any topic that is structured as a clearly defined procedure. Examples: industrial production processes, DACUM job analysis.

Advantage: The method has a clear structure.
Disadvantage: Sometimes the focus is a bit narrow.

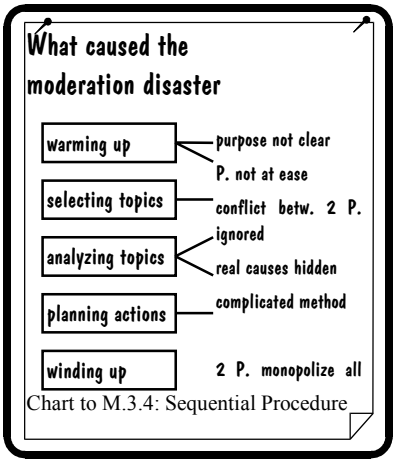


Chart to M.3.4: Sequential Procedure

How: The moderator works out with the group the exact steps of the procedure. Then the problems are analyzed step-by -step. The moderator records the contributions on the chart.

Method 3.5: Matrix

What for: The "Matrix" is suitable, for clarifying the relationships between data.

Advantage: Strict structuring of the cooperation.

Disadvantage: Poorly chosen headings limit the scope of the discussion.

Communication Problems

	internal	external
people	conflicts negative mood	no relation to professionals
organization	duties unclear	profile is vague
technique		phone often out of order

How: The matrix with the headings is designed before the meeting. Sometimes the headings are also formulated together with the participants. Afterwards the group discusses the problems by filling in the boxes. The moderator leads the discussion and visualizes the contributions.

NOTE: The matrix could also be dealt with in sub-groups.

Method 3.6: Spinning a Net

What for: "Spinning a Net is similar to "Mind-Mapping" and is appropriate for analyzing a topic in depths, as well as for showing its structure and the relation between the different parts. It can be used for many topics. In large groups the "Net" might become too complicated unless the moderator leads the group very directly or "teacher-like".

How: Starting point is a circle in the center of the chart where the topic or problem is stated. The moderator asks to contribute ideas for "expanding the net". It is important to look first for the main points and only then differentiate further. The "net" should grow from inside to outside.

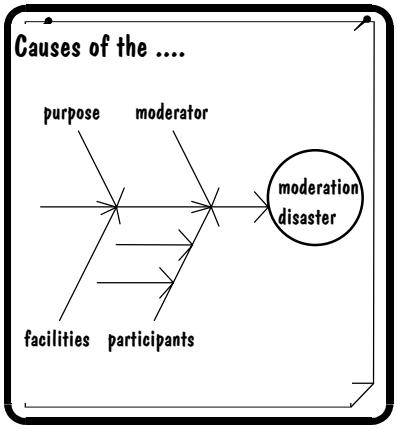
NOTE: On the Concept Card "Moderation - a process for facilitating teamwork" you can find an example of a "Net" showing the tasks of a moderator.

Method 3.7: Cause-Effect-Diagram

What for: "The Cause-Effect-Diagram" is a method for analyzing systematically the causes of problems.

Advantage: The causes can be analyzed in great details.

Disadvantage: The method requires an experienced moderator and sometimes a tough leader.



How: The moderator writes the effect in the circle on the right side. Usually he/she also visualizes the arrows with the main causes. These are further analyzed together with the group.

Method 3.8: "Problem Analysis Scheme" (PAS)

What for: This method allows a systematic analysis of a problem. Effects, causes, solutions and arguments against the proposed solution are listed.
Advantage: It has a clear structure and provides much data.

Disadvantage: PAS can hardly be done in sub-groups without the assistance of an experienced moderator.

Inefficient Meetings

How to see	Why	What to do	What's against
jumping from topic to topic	lack of leading skills	training	cost time
		coaching	coach?
	poor listening	introduce "rules"	
only few share	climate not safe	talk with superiors	aggressive

How: The moderator presents the pre-prepared chart and explains the headings. The participants call out answers and he/she records them. The process is initiated in the left column and goes towards the right side. To check consistency the problem is re-analyzed from right to left. Then the next effect is then taken up and processed.

Conclusion

This Skill Card shows eight different methods for analyzing topics. There are many more. A good moderator is able to link and sequence them so that the participants get the feeling that work is progressing and heading towards the purpose of the meeting.

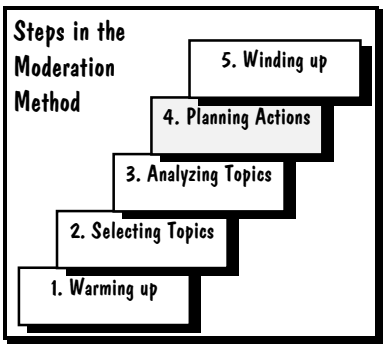
Performance Guide

Analyzing Topics

Did the moderator ..	yes	no
• choose appropriate methods for dealing with the topics?	❑	❑
• apply the methods properly?	❑	❑
• animate people to participate?	❑	❑
• avoid arguing on content level?	❑	❑
• avoid personal judgments on contributions?	❑	❑

All items should be marked "yes"

Moderate Sessions – Planning Actions



Introduction

In the moderation method "Planning Actions" is fourth step.

In the previous step, the problems and topics have been analyzed to an extent that the time is ripe to plan the activities for improving them.

Moderation for Results

Moderation is a method that requires a high input of time and other resources. It can only be justified if it produces useful results.

This Skill Card deals with the objectives of this step and shows two useful methods for meeting them, the Action Plan and the Gantt Chart.

NOTE: When the meeting has one of the following purposes, the results may not need an Action Plan:

- collect data and exchange information,
- make a list of problems that is accepted by all involved parties
- create rules and recommendations
- stimulate expressed self-commitment

Objective

The objective of producing an Action Plan or a Gantt chart is:

To come up with a mutually accepted plan on what to do for accomplishing the goals, including who will do it and by when.

Methods

Method 5.1: Action Plan

The simplest form of an Action Plan consists of the three basic columns:

- What to do
- Who is responsible
- By when

The Action Plan shown on this Skill Card as an example is more complex. It can be modified according to the specific requirements, but should always contain the three basic columns.

Column: "What"

The activities are formulated in a precise manner, using an action verb. They should be realistic and easy to control.

Action Plan

#	Activities	who	with whom	by when	Observations
1	Write workshop outline	CB	AK	11-8	
2	Get consent of Managing Board	KLP		21-8	NO further action without !!!!
3	Produce draft leaflet	CB	KLP	24-8	new template!
4	Organize facilities	AS	RBC	1-9	within budget frame
5	Inform target group	CB	KLP	1-9	distribute leaflet widely

Chart to M.5.1: Action Plan

Column: "Who"

Here, only the name of persons participating in the meeting can appear, because it is easy, but often useless to assign tasks to others. If nobody in the group is competent to carry out the task, somebody has to made responsible to find a competent person or to refer it to the organizational unit in charge. This is noted down in the column "Observations". If nobody wants to take over one task, obviously the task is not important and therefore taken out.

Column: "With whom"

Here, persons or organizational units can be filled in, that are not present, but would be able to help or have to be involved, because they are directly concerned with the problem.

Column: "By When"

It is important to make realistic time estimations. Tasks that require more than about three months should be further divided into steps that can be carried out in a shorter period of time.

Column: "Observations"

Information like suggestions for the implementation or how to report, or whom to inform, are recorded in this column.

Method 5.2 The Gantt Chart

A Gantt chart is a horizontal bar chart that graphically shows the relationships between the tasks to be done and the timing of each task. The tool was invented by an industrial designer, Henry Gantt, in the early 1900's.

Advantages

- provides a clear picture of the overall timing of the activities;
- useful for monitoring the progress of the activities.

Procedure

Step 1: One task per card

On a small card, clearly write the task. Start with an action verb.

Step 2: Estimate the duration

For each card (task) estimate how long it will take to accomplish the task. Write this time in the upper right corner of the card.

Step 3: Sequence all tasks

Pick up any two tasks, Task A and Task B. These two tasks can only be performed (sequenced) in three ways:

- Task A must be done before Task B
- Task B must be done before Task A
- Task A and Task B can be done at the same time.

Using this logic, sequence all tasks to be done in solving the problem.

Step 4: Create the Gantt Chart

Take all of the tasks and place them vertically on the left side of the chart. Draw in a time scale (in days, weeks or months) along the top of the chart.

Step 5: Draw time lines

Now, beginning with the first task, place a dot on the chart to the right of the task card that indicates the start time of the task. Using the duration of the task, now draw a horizontal line that represents that duration. Continue for all tasks.

Step 6: Assign responsibility

On each card below duration, the initials of the person who is assigned responsibility for this task can be written.

Your chart should look like the example provided below.

Hints and Tips

Tasks are shared equally

This step is often the most critical one in the whole process, because now everybody has to show commitment. Some people have an amazing ability to avoid tasks-- others an even more amazing tendency to overload themselves. Planning of actions requires time, and the moderators should avoid group pressure on individual participants. He/she should observe that the tasks are distributed more or less equally.

Enthusiastic people tend to overestimate their capacity

At the end of many moderated sessions - especially when things have been going well - a high degree of enthusiasm exists. Then, participants tend to underestimate time requirements for the tasks and overestimate their own capacity. The planning tools might need some revisions later on.

Special efforts of individuals are welcomed

Not all proposed tasks need to be accepted by everybody. The willingness of individuals to carry out a certain activity should not be suppressed.

Conclusion

Change, improvement and action are the goals of many moderated sessions. The Gantt chart or the Action Plan are the first proof if the group really wants to go for change. These tools define what will be accomplished by whom. They are the bases for the work; for the time after the meeting; and the link to a possible next meeting.

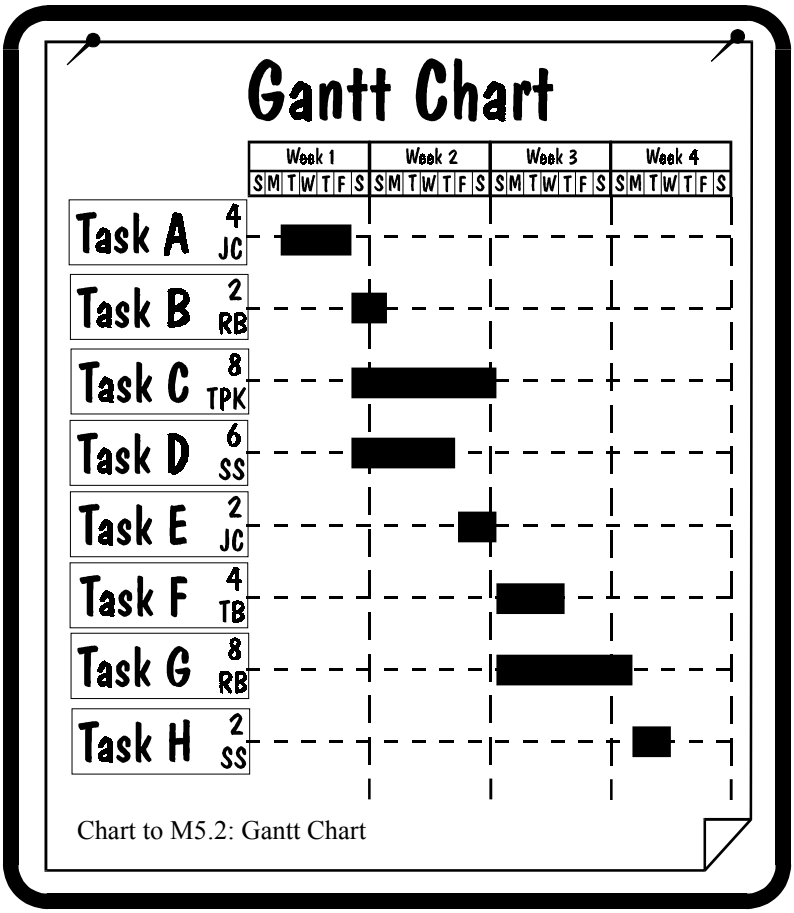
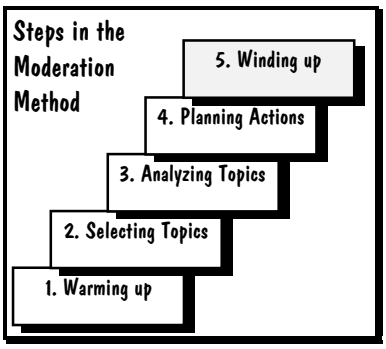


Chart to M5.2: Gantt Chart

Moderate Sessions – Winding Up



Introduction

In the moderation method "Winding up" is the last step.

Work on the content is finished and an Action Plan is on the board. Participants perceive that the close cooperation is coming to an end. This often creates thought, feelings and doubts like:

- What is still open and not discussed?
- Will it all really work out?
- Will I be able to do my assigned task on time?

The participants should leave the meeting or workshop in a positive mood and with the strong desire to implement the agreed upon Action Plan.

This skill card deals with the objectives of "Winding up" and presents some suitable methods.

Objectives

The objective of "Winding up" are:

- **Reflect on the result.** It is important to do a final assessment of the result. It could be an indicator for the energy that the individual will spend for implementing the Action Plan.
- **Make sure that nothing remains open.** All topics that were selected in step two, should have been analyzed. That is not always possible due to time constraints. In such a case, it is necessary to fix another meeting or formally agree upon omitting items.
- **Reflect on the process** Reflecting about the group process and the present emotional situation gives the last opportunity to the participants as well as to the moderator(s) to express feelings of satisfaction, doubts, or confusion. It helps to conclude the group work.
- **Make sure that the results are recorded.** Valuable work has been done in the meeting that should not be lost. Someone has to take over the writing of the minutes. Often, the moderator writes them.
- **Thank the participants** for their cooperation. Without the constructive collaboration of the team, the moderator would not have been able to fulfill his duty. Moderation builds on partnerships: one who guides, and the ones who allow to be guided.
- **Create a positive feeling of accomplishment and success** The participants should leave with the feeling that the meeting was successful and they have accomplished something. Therefore the finale should be positive!!!

Methods

Method 5.1: One Dot Question

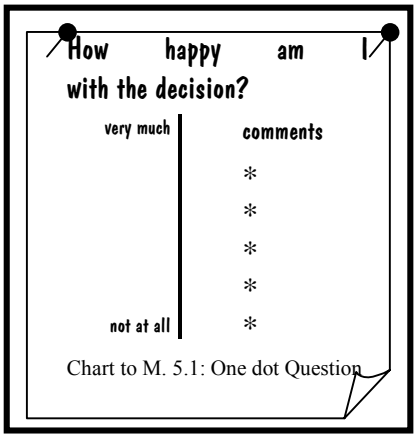


Chart to M. 5.1: One dot Question

What for: The "One-Dot Question can be used in many ways. Within a few minutes, it clearly indicates opinions and feelings. It can be used for evaluating the process as well as the content or the results. The following chart shows an example of result assessment. **How**: The moderator asks the participants to express their satisfaction with the result of the moderation by putting one dot along the line. When people are sitting again, they have the opportunity to comment and to express their feelings. The moderator records them without interpretations.

Hint: The simplest way of assessing the result is to take out the chart on expectations (from warming up) and ask the participants to make another dot on the same card. Use different colors! This gives a direct comparison.

NOTE: This sample chart has an open scale. It is also possible to use closed scales like the following chart.

Method 5.2. Mood-o-Meter

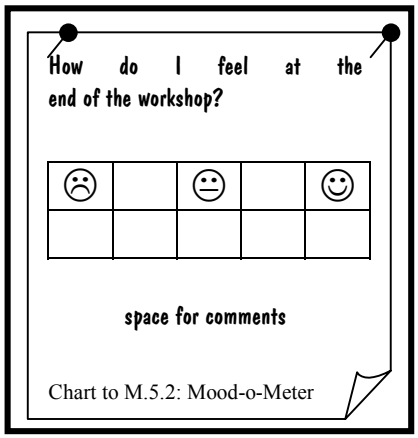


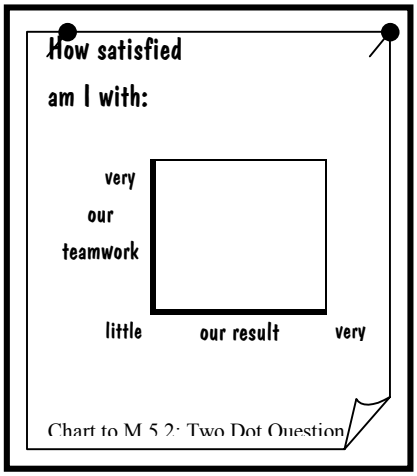
Chart to M.5.2: Mood-o-Meter

What for: The "Mood-o-Meter" is variation of the "One Dot Question" that evaluates the emotional feelings of the participants.

How: The moderator asks the participants to express their present mood by putting one dot in one of the boxes. When people are sitting again, they have the opportunity to give comments and to express their feelings. The moderator records them below the related boxes without interpretation.

HINT: Closed scales usually have between three to five boxes. If you want to force people to a decision, use a scale with four boxes!

Method 5.3: 2D-One-Dot Question



What for: The "2D-1 Dot Questions is a combination of the charts 5.1 and 5.2. Result (content) and process are assessed in one chart with one dot.

Advantage: Only one chart is required and the relation between result (content) and process becomes apparent.

How: The moderator presents the chart, explains the two dimensions, and shows, with examples, what the dot might indicate. The participants then put their dots. Afterwards, the proceeding is the same as under methods 5.1 and 5.2.

Method 5.4: Flashlight

When the workshop has been on human relation problems, or unexpected conflicts came up and had to be dealt with, it might be very convenient during "Winding up" to provide a chance to express positive and negative feelings. Possible questions would be:

- What was important for me?
- What else would I like to say to the group or one of the teams?
- With what feelings do I leave this room with?
- What do I take home with me?
- What does my commitment look like?

In the Skill Card "Warming up" you will find the procedure and "rules" for facilitating a flashlight.

Minutes

Most organizations write minutes of meetings. Only in exceptional cases in moderation is the Action Plan enough documentation. As all important contributions - statements, results of group works, questions and objections - are recorded on the pinboards, the minutes are a side product of the process ("simultaneous-minutes"). The task of minute writing therefore, consists of bringing the charts to the size of a normal sheet of paper.

There are two possibilities of doing this:

- Copying the charts by hand, typewriter or computer
- Taking pictures of the charts, and enlarging them to 18x24 cm and then coping them.

In the case of a longer moderation, the minutes might become too long and unhandy because of the many charts. The less important charts regarding the final result - although they were important for the process - could be omitted. It is convenient to do the selection together with the group, because it is a last chance to go through the whole process, and afterwards nobody can claim that something important is missing.

NOTE: This type of minutes is only suitable for distribution among the participants. If other persons have to be informed, specific minutes have to be prepared. The group might entrust someone to do it. This is recorded in the Action Plan under the heading "Activities" ("Write minutes for .....").

For informing "outsiders", it might be a good idea, that at the end of the workshop the participants themselves give a presentation using the charts. It may be necessary to remake some of them.

Conclusion

"Winding up" a meeting or a workshop often is done in a hurry because time is short. Such a rush might have negative effects on the implementation of the Action Plan and therefore, on the event itself. If after some time, actions are not taken and the problems remain the same or come up again, the moderation has failed.

Moderation builds on the wisdom of the group. The moderator is its helper and guide. The moderator has done the job well, if at the end, the group feels responsible for the results and shows commitment to the results and to the team.

Performance Guide

Did the moderator ...	yes	no
• reflect on the result and the contents?	❑	❑
• reflect on the process?	❑	❑
• record the contributions on the chart without interpreting them?	❑	❑
• appoint somebody for minute writing?	❑	❑
• create a feeling of accomplishment?	❑	❑
• thank the participants?	❑	❑

Moderate Sessions – Manage Workshop Groups

Introduction

The ability of most people to achieve their work goals is dependent in some way on being able to work together. A workshop is a special form of teamwork.

The role of the facilitator is to guide a group of people through the process of accomplishing a task assigned to them. The facilitator has no responsibility for the actual task itself but takes care of processes. In order to fulfil his/her role he has to understand how groups function.

Purpose

There is a need to differentiate between the **task** that the group is involved in and how it goes about achieving the task (**process**). The term "group dynamics" describes factors that influence groups as they go about their work. **Group dynamics is the way in which people communicate and interact in groups**.

Groups must have the technical knowledge to perform their task. But this is not enough. Often groups under-perform because they lack an understanding of group dynamics or group processes. It is one of the most important tasks of a facilitator to impart to groups this knowledge.

Benefits of group work

Two heads are better than one. When knowledge or information is a prerequisite for problem solving, groups are often superior to individuals. Since the individual members of a group often have **different approaches**, a group effort can be very beneficial because each gets to see and hear a different way of addressing the problem.

People who took part in finding a solution to a problem tend to get behind and support their own decision (**ownership**). They also help to communicate and **sell the decision** to other people.

What is a workshop group?

A workshop group is made up of people who:

- Have a common task (goal)
- Have a good technical knowledge of the subject area in which they are expected to solve a problem or to take a decision.
- Meet for a limited time
- Have a similar status
- Form a group of 8-12 people.

If the group is smaller, the quality of the decision might suffer. If the group is bigger, communications will be a problem.

Group development

Groups go through 5 phases of development during a longer workshop:

- Forming
- Storming
- Norming
- Performing
- Terminating

Forming

The individuals don't know each other. The new situation makes them insecure. In this phase, the group needs clear instructions. The participants should be acquainted with each other (icebreaker), with the premises, and the program.

Storming

Members attempt to develop a special place for themselves in the group. They fight for a position in the pecking order and dispute about informal leadership. The role and person of the facilitator is often questioned. It is important to have these conflicts. Don't suppress them. Name the conflict and deal with it adequately.

Norming

Most group members have now come to accept their fellow members. The group has developed its own rule for common behavior. In this phase, the group should not engage in co-operation with outsiders and wait a while before new members are admitted.

Performing

All energies are used for the assigned task. Even in this phase disturbances may arise. If there are serious troubles, the facilitator must address them. Successes should be celebrated to keep motivation high.

Terminating

The last phase is both a happy and sad occasion. The task is fulfilled but it's also time to say goodbye. Members need to review what worked and what to do differently next time. A final celebration with all stakeholders recognizes the effort of the team.

Ground rules for working in groups

There are simple rules that make groups very effective. A list of possible rules should be presented to the group at the beginning of a workshop. The group must have an opportunity to:

- Review these rules
- Modify them
- Cancel some
- Add others
- Agree on them

The final agreement is of utmost importance to have the commitment of all participants. The ground rules should be put on a flip chart and be displayed throughout the workshop. When necessary, the facilitator can point to them.

List of possible ground rules

- Sessions start on time. There will be no review for those who are late.
- Phone messages will be delivered at breaks except for personal emergencies.
- One person talks at a time.
- Every idea is valid.
- No lectures.
- Listen to each other.
- Stay in the room through meeting time.
- No food or drinks in the meeting area.
- Clean up after yourself.
- No side conversations.
- There is a time limit of one minute for each statement.

A final list should not have more than six rules.

Tips to deal with difficult participants

In almost all groups, there are people who hinder the group in fulfilling its task. Hindering behaviors are:

- Domination
- Withdrawal
- Degrading
- Side conversations
- Divertion
- Late coming

There are three main rules to deal with one of the above mentioned problems:

- **Address the problem** when the overall objective of the group is endangered.
- **Maintain the self-esteem of the person causing the problem.**
- Identify possible **alternatives.**

Domination / Diversion

Someone who participates too much or doesn't stick to the topic could be dealt with by:

- Establishing time limits for the discussion (ground rule) and assigning a timekeeper.
- Change the discussion to a written assignment.

Withdrawal

Someone who participates too little could be dealt with by:

- First asking everyone to write down one idea, then share the ideas aloud, one by one.
- Re-grouping all quiet people together or a quiet person with a caring person.

Degrading

When the group meets for the first time, the facilitator establishes ground rules with them. These guidelines should include the rule that all ideas will be accepted. The first time someone puts another person down refer to the rule and enforce it.

Side conversations

- Set ground rules at the beginning and refer to them if necessary.
- Stop the meeting and comment that it is difficult for you to concentrate on the topic at hand with side conversations occurring.

Late coming

- Establish ground rule and refer to it if necessary.
- Talk to the late comer in private and explain to him/her the necessity of being on time.

Conclusion

For a group to be successful, members must have technical knowledge and an understanding of group dynamics. A useful tool to help groups perform is a set of ground rules. Put on a flip chart and displayed throughout the workshop, they serve as a guideline for the working relationships in the group.

Performance Guide

Moderate Sessions – Manage Workshop Groups

Did the moderator:

Before the Workshop:

1.	Choose the group members according to the following criteria?		
	• Good knowledge in subject area?		
	• Similar status?		
	• Size (8 – 12 people)	Y	N

During the Workshop:

2.	Develop ground rules with the group?	Y	N
3.	Refer to ground rules in case of deviations?	Y	N
4.	Enforce ground rules?	Y	N
5.	Address problems when necessary?	Y	N
6.	Maintain the self-esteem of a hindering person?	Y	N
7.	Identify possible alternatives?	Y	N

For the successful management of working groups, all questions should be answered "YES."

Moderate Sessions – Get an Agreement

Introduction

A facilitator manages working groups by suggesting methods and procedures that will help the group to make a decision. He/she supports the group by guiding it through the process of finding a solution to a problem. A facilitator is not the boss of a group. Therefore he/she has not the power to dictate to the group what to do. He/she must ask the group for permission – getting an agreement on what he/she is doing.

Purpose

Big agreements are built upon small, basic agreements. A facilitator can create a foundation for getting agreements by asking for agreements right from the beginning. Instead of assuming that people will work together or that they will go along with an agenda, the facilitator has to ask them. After all, people have a choice. Even if they aren't free to leave the meeting, they can just sit there refusing to actively participate.

Advantages

Asking people for small, basic agreements right from the start accomplishes many useful things:

- It shows respect for people's autonomy.
- It helps build commitment.
- It lets the facilitator know right away if there's something they object to, so he/she can deal with it.
- It builds a foundation of agreement for the future.

How to ask for agreements

Get an agreement on the:

- Agenda
- Facilitator's role
- Desired outcomes of the meeting (objectives)
- Processes

Very often a simple question with a quick look at people's body language is sufficient. At other times more specific questions are appropriate.

Get an agreement on the agenda

The facilitator might say:

- Here's the agenda for the meeting.
- Is anything missing?
- Should anything be deleted?
- Is the time frame okay for you?

(The facilitator must be prepared to make changes.)

Get an agreement on the role of the facilitator

You might say:

- I will be your facilitator. I will guide you through the process of finding a solution to your problem. But I won't find the solution for you.
- Is this acceptable for you?

Get an agreement on the objectives

The facilitator might say:

- Here's what I think we should achieve by the end of the meeting.
- Does it sound reasonable to you?
- Do you want to make any changes?

Get an agreement on processes

Initiating processes is one of the main tasks of a facilitator. Processes are ways how the group will work. For example, ways of introducing participants, ways of collecting information, ways of taking a decision.

The facilitator might ask:

- I suggest we start by introducing ourselves. Do you agree?
- I suggest we create an agenda before we start. Does anyone disagree?
- Does anyone object if we take a 15-minute break before starting with the next topic?
- We seem to be stuck. May I make a suggestion?
- Shall we brainstorm?
- Instead of continuing to debate more options, I suggest we list some criteria for making a final decision. Will you help me to find good criteria?
- I suggest we prioritize this list. Does anyone have another approach?

As with any other skill, asking for an agreement needs practice. It's wise first to try in a low-risk environment until the facilitator is comfortable with the techniques.

The Agreement Cycle

The Agreement Cycle (see Figure 1.) can be used in several ways:

- During an introduction to present the group a method for reaching an agreement.
- During a discussion to find an effective way to produce quality ideas.

The purpose of the Agreement Cycle is **not** to get everyone to agree on everything that happens in the group. The purpose is to show the group that there is a possibility to create a win/win situation for everyone. It is also a method that allows the group to consider promising ideas before rejecting or accepting them.

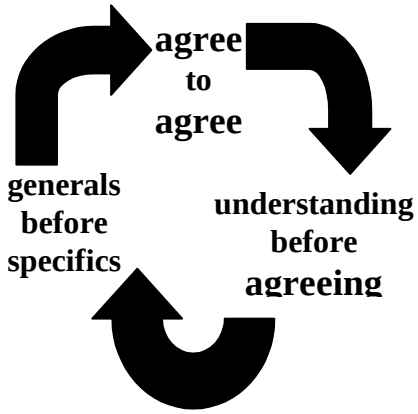


Figure 1. The Agreement Cycle

Agree to Agree

First, a group must decide whether it wants to work on reaching an agreement. Does the group agree to try to reach **consensus (full agreement)** on the issue? If so:

- Do we agree to make major decisions based on criteria?
- What decision-making method will we use if we fail to reach consensus?

  Alternative methods for decision making include:

  - Senior authority
  - Expert decision
  - Group vote (majority wins)
  - Compromise (both sides win and lose a little)

Understanding before Agreeing

People have a tendency to immediately evaluate what they hear. They often agree or disagree without really understanding what was said. A group must have a good understanding of the problems and proposals before making a good decision. A facilitator can focus the attention of the group on understanding by asking questions like:

- Before we go further, does everyone understand all the items on the list?
- Which of these items should be clarified before we move on?
- Is everyone clear on exactly what is proposed here?

A good time to focus on understanding is:

- After a brainstorming session
- Before prioritizing a list
- Before comparing alternatives to choose between them
- When people are reacting negatively to an idea proposed
- When people aren't listening to each other.

Generals before Specifics

People tend to say what they disagree with before they say what they agree on. This can cause unnecessary conflicts. A facilitator can break this communication pattern by asking questions like:

- Setting aside the specifics on this idea, do you agree with the general approach?
- If we could eliminate the problems you pointed out, would you agree with the general idea?

Conclusion

Getting an agreement is a basic skill of a facilitator. Because a facilitator is not the boss of a group he/she has to ask the group for permission for what he/she is doing. A facilitator has to get an agreement on the agenda, his/her role, the objectives, and processes. The ultimate aim of a facilitation event is that people come to an agreement on the issue the group deals with. This big agreement is built upon small, basic agreements. A facilitator can create a foundation for getting agreements by asking people for small, basic agreements right from the start. The Agreement Cycle is a helpful tool to explain the basic rules for getting agreements.

(This skill card is an adaptation of the chapter Get Basic Agreements from *The Facilitator's Toolkit* by Lynn Kearny, HRD Press, 1995)

Performance Guide

Moderate Sessions – Get an Agreement

Did the moderator:

1.	Ask the group for small, basic agreements right from the start?	Y	N
2.	Get an agreement on the agenda?	Y	N
3.	Get an agreement on the facilitator's role?	Y	N
4.	Get an agreement on the objectives?	Y	N
5.	Introduce the agreement cycle?	Y	N
6.	Ask the group to reach agreements on a consensus basis?	Y	N
7.	Emphasize on understanding before agreeing?	Y	N
8.	Point out the importance of agreeing first on generals before agreeing on specifics?	Y	N

To maximize agreements, all questions should be answered "YES."

Use Active Listening

Introduction

Speaking, writing and listening are the basic tools of communications. Research tells us that about 60% of all communicating is listening. Yet many people confuse listening with hearing. Hearing and listening are not the same thing. Hearing is automatic. Listening is an art that must be learned and practiced. It is sad to say that most of us are expert at hearing, yet few are expert at listening. Listening requires concentration and discipline. Effective listening is hard work.

Active Listening

In supervision conferences, active listening encourages the teacher to think deeply about their problem. With skillful listening and only a few comments, the supervisor can, in many cases, guide the teacher to first reflect on the problem and then, solve the problem. Active listening also provides support. The teacher is provided with a sounding board and encouraged to "think out loud."

The First Step

Again, the research shows that in most teacher-supervisor conferences, the supervisor dominates the conversation by talking too much—over two-thirds of the time in the conference! The conference becomes a lecture and any positive outcomes disappear.

The first step in effective listening begins with NOT TALKING—and for many of us this is a difficult task. But simply cutting down on talking is not enough. Listening is an intense process. Barker (1971) suggests that there are four components to the active listening process:

Hearing

Since hearing tends to be automatic, the only thing we can do to improve this component is to make sure that distractions and noise do not interfere with our hearing.

Attending

Listening involves focusing on the message. That means, for the listener, it is time to stop talking, stop reading, stop thinking about the coming weekend, and pay attention! The listener must make every attempt to "zero-in" on what the speaker is saying while at the same time—block everything else out that may interfere. Attending can be improved through the use of nonverbal cues:

Eye contact: The listeners eyes should focus on the eyes of the speaker (as long as it is not disturbing.)

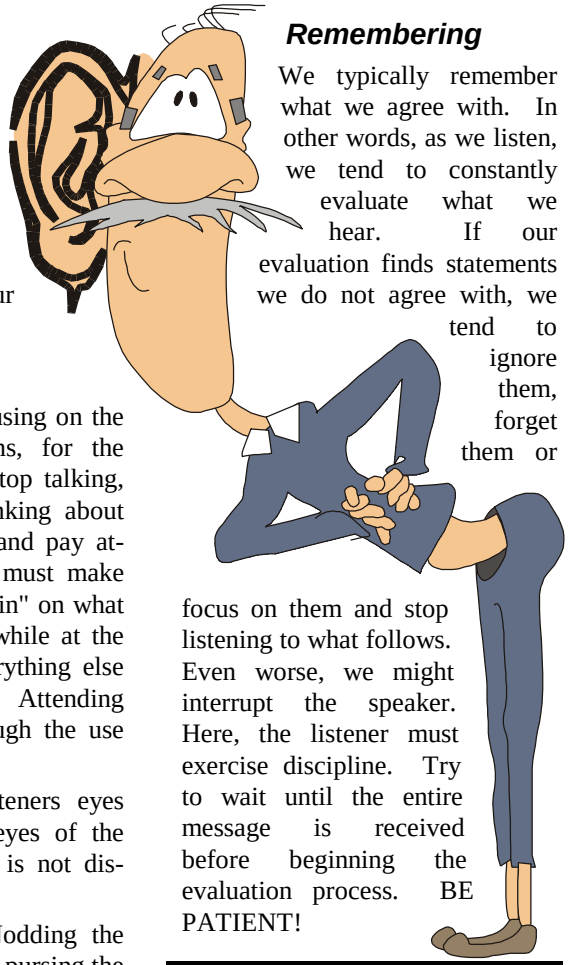
Facial expressions: Nodding the head, raising eyebrows, pursing the lips—all can indicate to the speaker that the listener is "with it."

Body posture: The best listener is a relaxed listener. A relaxed listener relaxes the speaker and communications is improved. A listener who is relaxed usually leans forwards, towards the speaker.

Physical space: The listener should be within a comfortable distance from the speaker. Sitting side by side is preferable to sitting with a barrier (desk) between.

Understanding

Understanding relates to the decoding of the message in the mind of the listener. Understanding requires the listener to think about what is being heard. If the message is being understood, only attending needs to occur. If the message is not understood, then the listener must ask for clarification.



Remembering

We typically remember what we agree with. In other words, as we listen, we tend to constantly evaluate what we hear. If our evaluation finds statements we do not agree with, we tend to ignore them, forget them or focus on them and stop listening to what follows. Even worse, we might interrupt the speaker. Here, the listener must exercise discipline. Try to wait until the entire message is received before beginning the evaluation process. BE PATIENT!

Styles of Listening

Listening (not hearing) is situational. From time to time, we use different styles of listening that fit the situation:

Passive listening

Passive listening does NOT mean simply hearing. The individual listens without providing any feedback (verbal or nonverbal.) An example of passive listening is watching television. The key to passive listening is SILENCE. Silence becomes the tool that allows the teacher to dig deeper into the problem without having the listener tell the solution. Silence can lead to the growth and development of the teacher.

Active listening

Active listening is a two-way communications process. As the teacher is talking, the listener is either:

Acknowledging: using nonverbal attending gestures (nodding) or at

times responding ("*Yes*," "*Um-hmmm*.")

Clarifying: asking simple questions to aid understanding. Example: Teacher: "*I really lost it today*." Supervisor: "*What do you mean by 'lost it?*'"

Paraphrasing: Repeating the speaker's message is a slightly different, maybe simpler structure. Example: Teacher: "*When I think about it, it seems that one of my main problems is that I have difficulty in controlling my class*." Supervisor: "*So, classroom management seems to be a problem*?"

Teacher: "*Yes. I really have never though much about managing—only about teaching*."

Empathic listening

Empathic listening is listening with feeling. The listener is trying to feel what the teacher is experiencing or feeling and then trying to respond to those feelings. Many communications experts believe that only when we try to listen with feelings are we receiving the whole message. This style of listening requires us to pay close attention to the nonverbal side of the message. Paraphrasing is a useful tool for empathic listening. Another effective technique is to address the feelings. Example: Teacher: *" I hate this job*!" Supervisor: "*Obviously, you have some strong feelings here. Would you care to talk about them*?"

Guidelines

To make your listening more active and effective, consider the following guidelines:

1. *To paraphrase is to understand*: Never say back the same words used by the speaker. Try to use as few words as possible. This makes the message easier to understand and avoids confusion.
2. *Respect Confidentiality*: Good listeners often hear more from the speaker than the speaker intended. Consider the conversation private.
3. *Recognize the teachers ability to solve problems*: Your listening demonstrates trust in this ability and your willingness to accompany the teacher along the journey which leads to a solution of the problem. Be a fellow passenger on this journey—not the driver.
4. *Recognize that active listening takes energy*: If tired and distracted, reschedule a meeting that will require your active listening.
5. *Learn to listen for the "hidden" messages*: Often, nonverbal cues will tell you more about the feelings of the speaker than the message itself.

Performance Guide
Use Active Listening

Did the Listener....

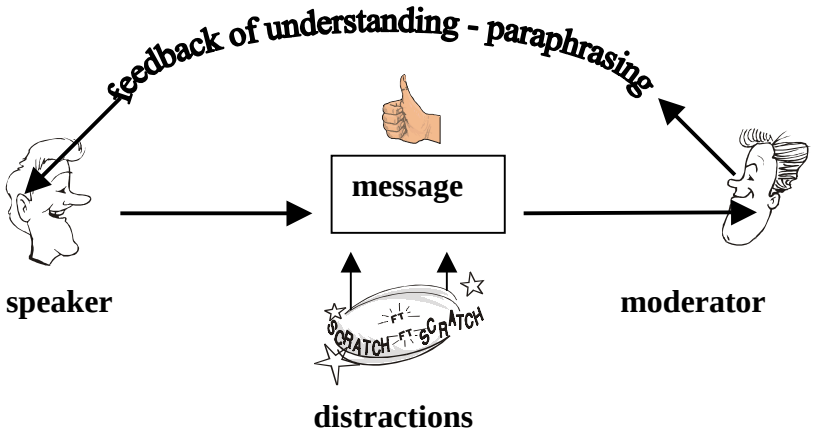
1. Make an honest attempt to talk less?
2. Eliminate distractions and noise?
3. Make eye contact with the speaker?
4. Use appropriate facial gestures?
5. Show a relaxed body posture?
6. Lean forward towards the speaker?
7. Maintain a comfortable space between him/herself and the speaker?
8. Avoid evaluating until the message is finished?
9. Use silence to encourage the speaker to continue?
10. Make acknowledging statements periodically?
11. Ask clarifying statements when needed?
12. Paraphrase statements for better understanding?
13. Focus on the feelings behind the message?
14. Allow the speaker to solve the problem?

For effective listening, all questions should be answered "YES."

Conclusion

The most effective supervisors are those who talk less and listen more.

Moderate Sessions - Paraphrasing



Introduction

Paraphrasing is a feedback technique used in communications. It means **you repeat a message you heard in your own words to verify its content.** For a moderator, paraphrasing is the skill of reformulating a complex and often emotional statement of a participant. The reformulation must be:

- short and clear
- reflect the participant's opinion
- understood by the group.

Whether a paraphrasing statement is correct or not is decided by the participant and not by the moderator! Paraphrasing is successfully completed when the speaker is satisfied that he/she has been correctly understood.

Listen carefully

Before you can paraphrase you have to listen carefully. Listening to the words said requires concentration. Paraphrasing requires an accurate review of what was heard and verification that it was accurately understood. As you listen to the words, look at the person speaking. Try to understand the meaning of the words. This may sound simple. But internal and external distractions keep you from focusing on what the speaker is saying.

- *Internal distractions* are thoughts that develop while someone else is talking. Sometimes they are related to what the person is saying. Other times you may be thinking about the next question you might ask. You must eliminate these internal distractions that keep you from focusing on what is being said.
- *External distractions* are those things happening around you. This can be noise from the outside, two people whispering, or someone writing on a flipchart. Don't pay attention to them or stop the person speaking until the distraction is eliminated.

Paraphrase what was said

Paraphrasing clarifies what you have heard. Repeat in your own words what you have understood. Good formulations for paraphrasing are:

- May I repeat …
- I heard you saying …
- As I understand it …
- Is it correct that …
- You asked if…
- You stated that…

Paraphrasing shows the speaker that you are listening to him/her and that you have understood his/her message. You also communicate that you are interested in his or her opinion. Paraphrasing is especially helpful when a person rambles or gives conflicting or complex information.

Variation: The "Seek First to Understand" Rule

The rule:

You cannot make your point until you restate the point of the other person to his or her satisfaction.

At the heart of many conflicts is the missing willingness to listen to each other. At this point a facilitator can introduce the rule. It forces two people to listen to each other and to paraphrase the opinion of the other.

When to use?

- When group members get stuck in their conflicting position.
- When the facilitator wants to shift the group awareness toward genuine listening and respecting one another's ideas.

Steps to be taken

When two members become entrenched in their conflicting positions, the facilitator stops the discussion and takes the following steps:

- The facilitator points out the necessity of members to listen to each other in order for the group to succeed.
- The facilitator seeks an agreement with the conflicting parties to do an exercise.
- When the participants agree, the facilitator writes the "Seek First to Understand" rule on the board.
- The facilitator asks the participants to continue their discussion while applying the rule.
- The facilitator monitors the discussion. The facilitator makes sure that no person proceeds until the other person is satisfied that he or she has been understood.
- The exercise goes on until both parties feel they have fully expressed their viewpoint and are understood.

(Adapted from *The Complete Guide to Facilitation* by Thomas Justice and David Jamieson)

Famous Quotes

True is not what you said; true is always what has been heard!

Vera Birkenbihl

Three-fourths of the miseries and misunderstandings in the world will disappear if we step into the shoes of our adversaries and understand their standpoint.

Mahatma Gandhi

Everybody wants to talk, few want to think, and nobody wants to listen.

Anonymous

One of the best ways to persuade others is with your ears – by listening to them.

Dean Rusk

It is the province of knowledge to speak, and it is the privilege of wisdom to listen.

Oliver Wendell Holmes

The road to the heart is through the ear.

Voltaire

Let every man be quick to hear, slow to talk.

New Testament

Know how to listen, and you will profit even from those who talk badly.

Plutarch

Conversation in the United States is a competitive exercise in which the first person to draw a breath is declared the listener.

Nathan Miller

Conclusion

At the heart of many conflicts is the missing willingness to listen to each other. Paraphrasing forces you to repeat a message you have heard in your own words to verify its content. Paraphrasing is successfully completed when the speaker is satisfied that he/she has been correctly understood.

Performance Guide

Moderate Sessions – Paraphrasing

Did the moderator listen carefully by:

1.	Looking at the speaker?	Y N
2.	Eliminating internal distractions?	Y N
3.	Eliminating external distractions?	Y N

Did the moderator paraphrase by:

4.	Repeating the message heard in his/her own words?	Y N
5.	Being short and clear in his/her formulation?	Y N
6.	Reformulating the message until the speaker was satisfied?	Y N
7.	Using statements like	
	• *May I repeat …*	
	• *As I understood …*	
	• *Is it correct …?*	Y N

For successful paraphrasing, all questions should be answered "YES."

Moderate Sessions – Visualizing Discussions

In Moderation,
Visualizing is ....

.... creating a visual image of the discussion on the pinboard

Introduction

Where creativity of thoughts is a concern, free communication is required and no ideas should get lost. In the moderation method it is fascinating to see how the ideas written on cards move around on boards where they are held only by tiny pins, till the group has decided about their final place.

Communication that is oral and written at the same time requires some simple rules. They help the participants to forget about procedures and to concentrate on creating ideas, solutions and decisions. The moderator is the person who makes sure that ideas flow and are taken up in a way that everybody feels at ease and contributes.

This Skill Card (one of a series) gives some basic rules for visualizing discussions and many practical hints for doing it.

Using Equipment and Tools

Moderation needs specific, but not sophisticated equipment and tools:

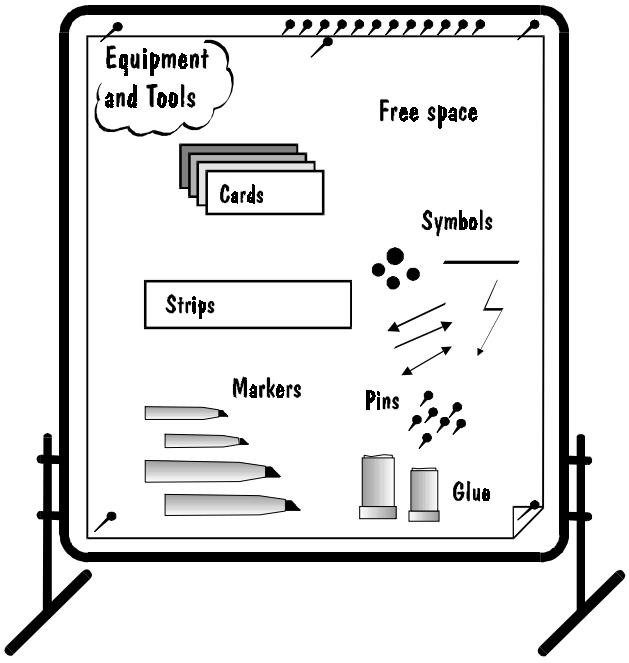
- pinboards
- large sheets of light brown wrapping paper
- rectangular cards
- strips
- map-pins
- markers (felt-pen)
- round little stickers (if available)
- glue sticks
- free space

The basic equipment of the Moderation Method is the **pin-boards**. In the best case they are made of foam core with a light frame, so that anybody can moved them easily. A good size of the board would be about 125 cm wide and 150 cm high.

The large **brown paper sheets** that are a little bit smaller than the boards (125 x 145 cm), are pinned on the boards. When doing that, you should leave the top 3 cm of the board visible. That's the space where extra pins are placed.

Every participant gets one black small chisel tip **marker** (5 mm) for writing ideas on the cards. The moderator additionally has large chisel tip markers (10 mm) of different colors. They are used for headings and writing directly on the brown paper.

The **cards** have a size of about 10 x 21 cm (1/3 of a A4 sheet). It is necessary to agree upon the use and meaning of the colors.



For example:

Color	Use
white	positive statements and ideas
yellow	alternative ideas, conclusions, next steps
pink	comments on particular cards, criticisms
blue	headings
blue (square)	headings of clusters

The title of the chart is best written on **strips** (about 10 x 50 cm) or directly on the brown paper.

The **map-pins** are used to pin the large paper as well as the cards on the board. When the chart is finished, the cards can be glued on the brown paper.

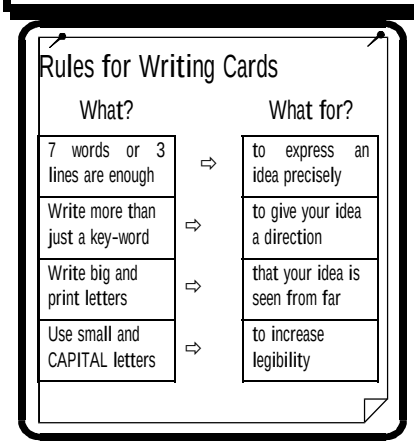
Symbols like lines, bullets, arrows and flashes are drawn directly on the brown paper or on the concerned card. Use flashes for marking dissents, arrows and other symbols for emphasizing ideas.

Free space is more effective for separating ideas than lines. It also symbolizes the mental openness of the participants.

Hint: Use colors and symbols cautiously, free space extensively. Their proper use shows clarity and precision of thinking.

Writing Cards

It requires some practice to get used to the chisel tip markers and to find the right size of the letters. The result is best if you hold the marker so that the sharp end of the chisel tip is heading towards yourself. A template with lines as shown in the illustration, is useful. The following chart shows the basic rules of lettering.



Composing Charts

The charts determine to a great extent the output of a moderated event. It's worthwhile to design them carefully. Be creative, but do not exaggerate. All charts should reflect the same "style. "

- **First, define the objective** of the chart and the kind of information you want to give yourself or the participants to elaborate.
- **Take into account reading patterns**. Write and compose from left to right and from top to bottom.
- **Put only one question or unit of meaning per chart.** Like the cards, the charts can be rearranged.
- **Write the title of the chart in the upper left corner**. Make a cloud around it.
- **Create clusters** of cards **or blocks**. Blocks are easier to perceive as units than long lines over the whole chart.
- **Pin related cards close to each other.** Separate not related cards clearly.
- **Leave enough free space between clusters**. This isolates ideas and allows new ideas and comments to be added.
- **Leave space of ~1 cm between the cards**, when designing a matrix or a linear sequence. This creates contrast and separates ideas. If afterwards lines are required, you can draw them in-between.
- **Use the collage technique**. Move the cards by pinning them till you get a good result.
- **Draw lines directly on the brown paper** as frames for the clusters or connecting lines between cards.
- **Emphasize with symbols** but don't produce visual noise! ! ➔ ● ⇔
- **Test the effect** of the chart before gluing the cards. Look at it from the viewpoint of the participants and get their approval.

Presenting Charts

Charts should explain themselves and not require many words. A presentation according to the following rules might increase their effectiveness:

- Stand on one side of the board.
- Face the audience.
- Point at the concerned card with the hand that is nearer to the board.
- Read everything aloud. Some cards might be difficult to read from a far distance.
- Pause for effect. Do not kill people's thinking by long explanations.

Conclusion

Visualization is the handicraft of the moderator. Without a certain level of craftsmanship, moderation will hardly be successful. Legible writing improves communication. The design of the charts has a direct influence on the form (and content) of the outcome. A proper presentation style increases the effectively of the charts.

Performance Checklist

Did the moderator ...	yes	no
• use colors consistently according to their meaning?	❑	❑
• use symbols and free space accordingly?	❑	❑
• write according to the rules?	❑	❑
• observe reading patterns in the design of the charts?	❑	❑
• design all charts in the same style?	❑	❑
• put only one unit of meaning per chart?	❑	❑
• present the charts properly?	❑	❑

All items should be marked "yes"

Moderate Sessions – Document Moderation Events

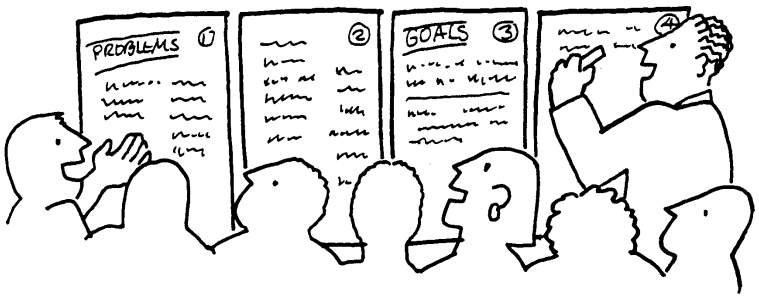


Figure 1. Workshop memory in form of charts on the wall

Introduction

During a facilitation event, data is generated. It is the responsibility of the moderator to make sure that data is not lost and is communicated to the respective persons. Depending on the facilitation event – meeting or workshop – a different approach has to be taken. For a meeting taking the minutes is usually sufficient. For a workshop, a more elaborated documentation form is required.

The meeting minute

The functions of the minutes of a meeting are to:

- Clearly communicate what decisions were made
- Communicate what actions will be taken.

A good record of a regular meeting is generally not longer than one page (see Figure 2). It is an action record, not a diary. Additional data that should be incorporated into minutes are:

- Members present
- Members absent
- The leader of the meeting
- The time, place, and length of the meeting
- The next meeting date

A good practice in a regular meeting is to review decisions and subsequent actions before the group adjourns. A flip chart can be used to display the key decisions and actions planned. The chart can be reviewed immediately prior to the end of the meeting to check its accuracy and make any final modification. Minutes should be distributed as soon as possible after a meeting – while the meeting is still fresh in the mind.

The workshop documentation

During a workshop, every important statement is recorded on flip chart (see Figure 1) or on flash cards. This information serves as a group memory. It is posted on a wall or a pin board and it is on display throughout the workshop. A group memory helps to:

- Stay focused on the issues
- Show the group where they have been and where they are now
- Make it easier to spot trends and patterns
- Create a record of what agreements have been made and show what issues are still unresolved
- Allows someone arriving late to update themselves without interrupting the group.

Guidelines for Recording

Effective and efficient recording is a task in itself. A facilitator is therefore advised to assign a recorder. Guidelines for good recording are:

Be neutral. Use the speaker's own words. If you must condense a very long or complex idea, ask the speaker to shorten it for you.

- **Verify unclear statements.** If you are unsure of what you just wrote, ask if it is correct.
- **Work fast**. Don't worry about spelling, grammar, or complete thoughts. Write down key words, abbreviate, and keep up.
- **Accept corrections**. Accept any corrections group members ask you to make even if you wrote exactly what they said. It doesn't matter who was wrong or right. Just make sure the record reflects what the group members intended to communicate.

To record for a group, the recorder must be able to write the essence of what they are saying fast, legibly, and without slowing the group down too much.

Guidelines for Managing Flip Chart Papers and Flash Cards

- Glue the flash cards on brown paper. Arrange them in the same way as they were displayed on the pin board.
- Number, label, and date all pages. This helps to organize, store, and retrieve the records after the meeting.
- Display the papers on the wall or on the pin board throughout the workshop.
- During long workshops, many charts are developed. Some of these charts often contain intermediate steps that are no longer of importance to the end result. In this case, the group selects the important charts and sorts out those that are of no use anymore.

Compiling Documents

Usually the charts produced in a workshop should be copied word for word for the record. Such a record (protocol) has the great advantage of being authentic and therefore does not need to be approved by the group. It also ensures that the record is not manipulated, which is often the case with conventional minutes.

There are two basic technical ways of compiling the record:

- You can copy the charts down on paper word for word.
- You can photograph the charts (photo protocol). The prints should be 18x24 cm large and can be easily photocopied later on.

These types of protocols are only suitable for people who took part in the moderation. Should other people be informed about the workshop, a separate record (final report) has to be compiled.

Final Report

As a facilitator of a workshop, you will need to keep certain people in the organization informed about the outcome of the workshop. The final report must be more comprehensible than the protocol. It should be written with the target group in mind. A written report can be either an overview of the results or a more detailed report depending on the requirements. Ask what kind of record people expect at the end of the workshop.

Conclusion

During a facilitation event, data is generated. Depending on the event, different recording strategies have to be chosen. For a meeting minutes are sufficient. Minutes communicate what decisions were taken and what actions will be taken by whom and by when. A workshop documentation consists mainly of flip charts and flash cards. This information must be transcribed word for word on a paper. An alternative method is the photo protocol. A protocol is only understandable for people who took part in the workshop. For outsiders a more comprehensible report must be written. Such a report is more concise. It gives an overview over the workshop and summarizes the major outcomes.

name of meeting	date: duration:	
members present/absent:	date of next meeting:	
agenda item	decision:	
1 2 3	1 2 3	
subsequent actions	responsible person	date due
1 2 3		

Figure 2. Layout for meeting minutes

Performance Guide

Moderate Sessions – Document Moderation Events

Did the moderator:

Before the Workshop:

1. Assign a recorder? Y N
2. Instruct the recorder to:
   - Be neutral? Y N
   - Verify unclear statements? Y N
   - Write fast (use abbreviations and keywords)? Y N
   - Accept corrections? Y N

During the Workshop:

3. Use flip charts and flash cards? Y N
4. Glue flash cards on brown paper? Y N
5. Let the group select relevant charts? Y N
6. Display the charts on the wall throughout the whole workshop? Y N

After the Workshop

7. Compile all records?
   - Enter data word for word
   - Or photograph data Y N
8. Write a final report for outsiders? Y N

For a good documentation, all questions should be answered "YES."