

**USAID/OFDALAC TRAINING AND TECHNICAL
ASSISTANCE PROGRAM**

Interactive

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*Knowledge and skills developed for adults
to solve performance problems*



***Reference
Material
Pre-Work***

Version 2010

Interactive Training Course

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The Interactive Training Course is aimed at Instructors with deep knowledge of their specialty, who need to quickly acquire knowledge and skills to use the interactive teaching method.

This material is based on the USAID/OFDALAC Training and Technical Assistance Program's Training for Instructors (TFI) Course and has been redesigned by Jorge A. Grande, IRG Consultant for the USAID OFDA LAC program. The 2010 version of this course has been revised by Ricardo Berganza, IRG Consultant for USAID OFDA LAC.

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Interactive Training

Upon completing the lesson, participants will be able to:

1. Define Training
2. List three teaching methods
3. List five elements of the Interactive Teaching Method (ITM)
4. Describe the two primary ITM modes

Learning is a permanent change in behavior caused by experience and knowledge.

It is inherent to all animals and occurs along their lifetime with more or less intensity. People learn during their entire existence. You cannot “unlearn”. It is a socially transcendental complex process and it is therefore the object of study of several disciplines such as biology, psychology and education.

*One thing is to know,
and it's another to teach.
Cicero (106 BC-43 BC)
Roman writer, orator
and politician.*

Learning is demonstrated in a person's behavior changes caused by interaction with the natural, cultural, social, demographic, political and economic environment in which he/she grows and develops. This permanent interaction makes it progressive and adaptive.

Education and training both address learning, although with different scopes. Trainers must take into account that teaching requires great preparation and permanent updating.

*Education addresses
integrated vocational
training of a person in
his/her social context
and has a broader scope
than training.*

Training (OBJECTIVE 1)

Teaching-learning process designed, developed, presented and evaluated to guarantee solution to performance problems based on the need for knowledge and skills.

In adults, this process which is part of andragogy, is clearly aimed at achieving professional or technical competency in the learner.

It should be noted that, although not discussed in detail here, attitude is very important and is always present. Modifying attitudes in adults requires processes that are too complex to address in this course. Even then, each training process promotes affective aspects related to the behavior change to be accomplished, as positive changes are observed.

*Andragogy is a
neologism proposed by
UNESCO to designate
permanent training. In
its restricted sense, it is
used as equivalent to
adult education.*

The behavior change mentioned above occurs due to the need to *be able to do*. Adults must perceive that what is about to be learned satisfies a need and brings a personal benefit.

An adult is integrated into a teaching-learning process aware of his/her skills and knowledge and expects these to be recognized. He/she uses critical judgment, so what an instructor says will not simply be accepted as “the truth”, but as “a truth that will have to be tested”.

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Sometimes this means sacrificing productive hours; others its time that could be spent with family, or rest and relaxation. He/she values time management and if invested it should be to gain something.

Adult training requires procedures or sequential actions that facilitate access to knowledge and skills that adapt to the motivating needs and contribute to improve or accomplish a particular performance. It is necessary for the method to meet these conditions.

There are three fundamental questions in training:

Where am I going?, the answer is in the *objectives*

How do I get there?, the answer is in the *method*

How do I know I got there?, the answer is in the *evaluation*.

Method (in training)

Set of procedures aimed at accomplishing the objectives of the teaching-learning process.

In adult training, the method should stimulate and focus attention, facilitate access to the information that will contribute to acquiring knowledge and skills, make participation orderly and entertaining and favor permanent verification of the training accomplished.

It is important that it be solidly based on well stated and clearly drafted objectives that express the needs of the trainees. The explicit ***purpose*** of the course or workshop and the ***objectives*** that guarantee what the trainee will be able to do, made known to the participants from the beginning of the training, will be a significant attraction.

Another aspect to be considered is announcing who will be responsible for the activity, how and what means will be used to develop it and what are the rules for participating.

So far, the problem has been defined: needs on the one hand and capacities on the other. These are the conditions necessary for ***preparation and presentation of a plan*** to solve it.

Effective presentation of the lessons requires an exchange of understanding between the instructor and the people being trained. In order to achieve this, it is indispensable for the instructor to possess ***communication skills***, good public speaking abilities and careful attention to body language.

Thus, solid arguments, inducing reasoning and a shared vision, adequate emphasis and timely repetition will achieve the desired result.

The method will use relevant ***support materials and equipment***, as well as the necessary ***facilities*** for appropriate development.

Although given its multi-directional communication characteristics there will be achievements during the lessons, the process will be completed with the ***evaluation*** of the final product.

Adult training must be efficient in relation to the effort of the person and the time invested.

Knowing is not enough; we must apply. Willing is not enough; we must do.
Johann W. Goethe
(1749-1832) German poet and playwright.

Best-known methods (OBJECTIVE 2)

If people are asked about their educational experience, they will be more familiar with the lecture method, which they would have experienced between elementary school and university. Many would have tried to learn by themselves with the self-teaching method. A brief review of these methods before moving on to interactive teaching.

Self-teaching method

Offers people the possibility of receiving training without having to go to a specific location to receive classes from a professor or instructor. It is dependent on personal interest and uses materials (books, exercise notebooks and self-evaluations) to guide studying. Earlier on, interaction was scarce; currently, with the development of technological means (computers, Internet) and perfecting of at-a-distance education, interaction has increased.

Self-learner: one who learns by him/herself.

Lecture method

The most common given its use in schools, institutes and universities. Attendance is required but with scarce interaction, limited to questions and answers. The teacher, source of knowledge says and the student, receiver, learns. It is useful in classes where a large number of people listen and take notes, and it is their responsibility to research, verify data, develop information and prepare to be evaluated. It is being reviewed and there is a tendency to introduce more flexibility by stimulating creative capacities.

Receiver: one who receives.

Interactive Teaching Method (ITM)

Set of procedures featuring the constant exchange of understandings between the subjects involved in teaching-learning in order to develop the knowledge and skills required to accomplish the pre-established performance objective.

It is extremely rare to find a method that applies to all needs. By examining and testing the most common in the teaching-learning process, it was found that the most appropriate to meet the needs and characteristics of adults is the interactive teaching method. It is the one used in this Course.

It integrates doing, feeling and thinking in each subject. The trainee is called the participant, due to his/her active and permanent participation.

It is based on performance objectives and you learn by doing. It recognizes the prior capacities of the participants.

The facilitator instructor guides the process and pays attention to emotivity, interests and individuality, while promoting reflection and sharing of the common learning achieved. There is continuous feedback.

It is difficult to apply to a large audience. It can work acceptably on groups of up to 25 people. A large number significantly limits participation, which is one of the strong points of the method.

Elements of the ITM (OBJECTIVE 3)

The ITM is supported on five fundamental elements:

1. objectives,
2. contents,
3. interaction,
4. feedback and
5. evaluation

1. Objectives

The performance objective and the training objectives are stated at the start of the process and guide the entire development. They are a permanent guide for the instructor as well as for the participants.

2. Contents

They compile all the information necessary and consistent to accomplish the objectives. They expose the accessory aspects that are strictly necessary to understand the substantive elements.

3. Interaction

It is the most relevant element of the ITM. The interaction is with subjects, phenomena and objects associated to the learning contents. Consists of a permanent and regulated multi-directional exchange of information for building knowledge and skills based on prior capacities and earnings.

This exchange must be promoted, guided and maintained within the framework of the objectives, by an instructor who proposes the discussion of definitions and concepts, presents and obtains examples, returns questions to the groups, takes advantage of individual contributions and coordinates group synthesis.

People learn in different ways and therefore it is important for interaction to be supported with visual and audio aids. All will benefit if exercises are added to verify what was taught/learned.

4. Feedback

The multi-directional nature of interaction enables the instructor and the participants to receive information about the progress of the teaching-learning process, detect deviations and correct them.

Participants' questions and answers may help the instructor evaluate progress or detect problems continuously. Feedback may be promoted through trial and error with questions that should be answered by the participants or through stimulus-response, when the instructor makes a statement whose foundation must be explained by the participants.

Another aspect to be taken into account for effective feedback is to carefully listen to the participant and immediately respond to a contribution (verifies correctness or not) or question (doubt, lack of knowledge). Immediacy of a response takes advantage of the situation of maximum attention from the participant. If he doesn't know the answer, the instructor must give proof that he listened intently, for example repeating the question, and announcing he will look for the answer.

The performance objective describes the final behavior displayed by the participant at the conclusion of the Course or Workshop. Details are added under purpose, objectives and goals.

Interaction takes advantage of the capacities an adult has. Offers the opportunity for several approaches to the same topic and receiving feedback on the process.

In accordance with the objectives, feedback facilitates continuous evaluation and immediate correction.

5. Evaluation

In the ITM, as was mentioned in feedback, the learning process is evaluated constantly. An evaluation at the start of each lesson may be very appropriate. It is necessary to evaluate at the end of each lesson and at the conclusion of the course to verify whether the training objectives and the performance objective were satisfactorily accomplished.

Objectives are indispensable to evaluate entry level, progress and final behavior.

ITM modes

Mode: Interaction system used between the components in any learning situation to accomplish pre-established objectives.

The components of a learning situation are: instructor, participants, purpose, objectives, contents and media. This method has several modes.

Interactive Presentation (IP) and Demonstration and Practice (D/P) are the most commonly used modes (OBJECTIVE 4). As long as they are used for the purpose of training to accomplish the established performance objective, others can be added, such as: case study, simulation, drill, programmed books, individual teaching, audiovisual and electronic interactive media.

Interactive Presentation (IP): mode selected when conceptual training is required.

When there is a need to train in the area of managing data, information, association of ideas, fundamentals and interpretations, the IP mode is preferred. The instructor presents the topic and interacts with the participants to share concepts, discuss them and verify validity by proving the value of the knowledge developed to solve predominantly intellectual problems. Ex., designing a plan, following a procedure for decision making, drafting objectives.

Lesson preparation and presentation addresses topic sequence and use of aids.

Demonstration and Practice (D/P): mode selected when training is required in predominantly psychomotor skills.

Training in the use of instruments and tools, to operate fixed or mobile equipment and machinery, to drive vehicles, for special procedures such as cardio-pulmonary resuscitation, immobilization of fractures, transportation of injured victims and other predominantly psychomotor tasks, is facilitated by using the demonstration and practice mode. The instructor explains and executes the procedure, verifies the participants' understanding after each step, and then the participants practice it. Because of the repetition and practice, it is the best mode to guarantee accomplishing the objective that guides the training.

Usually supported by real instruments, tools and equipment.

Some practices may pose risks to participants and require strict safety measures.

Following are the *modes* used for training in order to achieve a pre-established performance objective; they have a lesson plan and contain the five elements of the ITM: objectives, contents, interaction, feedback and evaluation.

Simulation: an exercise that attempts to recreate a real situation; participants play roles (real in their job or fictitious) and must generate

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concrete outputs (decisions, strategies, plans) following pre-established rules.

There is certainly interaction between the participants that play the different roles. When used in training, it should be aimed at accomplishing the objectives that will effectively address the participants' needs.

It requires an appropriate space where the group, 7 to 15 people, can work on the problem comfortably and with adequate time. The material consists of a script that progressively presents situations to the participants where they must make decisions or take actions of different types and levels.

This material must:

- be designed very carefully and take into account the profile, position, interests and needs of the participants;
- contain everything required for the participant to be able to do the work;
- contemplate the growing development of knowledge and skills that, under the instructor's guidance, will guarantee the desired result or output;
- address a simulated problem rather than a real one that must be resolved by the entity organizing the course.

Drill: an exercise that simulates a real situation; participants undertake the real job for which they are training and must generate concrete conceptual (decisions, plans, strategies, tactical assignments) and operational (handling instruments, tools, equipment, vehicles) outputs following pre-established rules.

Often used in combination with the IP and D/P modes. Useful for practicing the performance objective that should be accomplished by the participants. It is costly and risky, requires deployment of large quantities of material resources and careful implementation of safety measures.

Case study: a completely developed real situation presented to a group, 7 to 15 people, for analysis, synthesis, conclusions, assessments or proposals regarding the situation presented, to demonstrate accomplishment of the pre-established training or performance objective. Also requires careful design and preparation of the group with whom it will be used as a mode.

Other training modes: programmed book, learning group, electronic media and others can be used as ITM modes when based on planned lessons that include: objectives, contents, interaction, feedback and evaluation. In most cases, a prior explanation is required, as well as development, practice and an assessment of the product or output

Technique

Auxiliary means of the mode or method that contributes to accomplishing the same objective.

A technique is usually a complementary procedure, specific and prepared to obtain the expected result.

There will be a discussion below on how simulations may also be used for evaluation.

Case studies have the advantage of putting participants in contact with reality.

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For example, there are techniques for various tasks such as: handling a tool, accessing a victim, selling a product, etc.

The TFI course often uses the brainstorming technique, which fosters individual and team creativity.¹

The group faces a question or the definition of a problem that must be presented clearly, and preferably, in writing.

The facilitator reminds participants to express their thoughts as they occur, without looking for reasons or foundations, without self-selection or self-censorship. He also warns that they should abstain from expressing criticism or showing skepticism, boredom or disapproval. For a pre-determined period of time, the facilitator receives absolutely all ideas and contributions that may help solve the problem, without leaving any out, even if they sound absurd. In a subsequent step the contributions deemed relevant are selected, grouped under appropriate criteria and discussed until a decision is made about which are adequate to solve the case. Several formats may be used to present the contributions (freely, by turn, by alternate turns, etc.).

It has variations. In training, it allows generating interaction and taking advantage of the knowledge, skills and experience of the participants in order to build new capacities. The variation used more commonly in this course is ***forced association***.

For example, after presenting the name (trigger) of a concept to be defined, the facilitator asks for words that the group *associates* with the concept and only accepts *–forced–* those that are really related. Next, he/she may:

- ask the group to use the words recorded to prepare the definition sought; or
- present the previously prepared definition and highlight the words offered by the group contained in the definition.

Thus, there is interaction and the definition that was already present in the group is accepted, reinforcing the sense of ownership of the concept.

Based on the *Training for Instructors Course* (TFI), 1995, USAID/OFDALAC.

Alex Osborne, creator of the well-known brainstorming technique said: "Creativity is so delicate a flower that praise tends to make it bloom, while discouragement often nips it in the bud".

¹ Created in 1941 by Alex F. Osborn; in 1963 he published his book on creativity, [Applied Imagination](#) .

Purpose, Objectives, Goals

Upon completing the lesson, participants will be able to:

1. Define purpose, objective, goal;
2. List the components and characteristics of objectives;
3. Develop objectives for a training presentation.

As described in the information on training, training is designed, developed, presented and evaluated to solve performance problems that may be addressed with knowledge and skills.

This teaching/learning process must be effective and efficient. For this, it is indispensable that the performance to be accomplished and the capacities to achieve it are appropriately described and made known to instructors and trainees.

All training activities must have an explicit purpose, in accordance with the objectives stated that clearly express the behavior change that will enable participants to solve their performance problem.

The main guidelines will be contained in the performance objective (what he will do) and the training objectives (what he will know).

Purpose, objectives, goals (OBJECTIVE 1)

Purpose (in training) is the overall expression of what the training activity (course, workshop or other) offers, its rationale and what is sought.

Example: *Contributing to the training of technicians in civilian protection to improve disaster risk management and reduce vulnerability in small municipalities.*

Places the trainers or instructors and the participants on the scene. The purpose is what must be accomplished in the course and includes materials, method, techniques, instructors and environment. It is evaluated through the success of the participants.

Objective (in training): Statement that expresses the capacity to be accomplished by the participant.

The objective must be drafted in such a way that any person reading has the same understanding and this perception should match the intent of the author. Communication exists when the perception of the receiver is identical to the issuer's. For this reason, it is said that the perception of the receiver and not the intent of the issuer guides the understanding.

Performance and training objectives, their specificities and examples of each one will be discussed later.

Goal applies to partial achievements that contribute to accomplishing an objective. It should meet the same conditions as the objectives.

Trainee: person who participates in a training activity to improve specific skills. From here in on he/she is called a PARTICIPANT.

Purpose: desire or intent to do or not to do something.

The objectives guide the instructor in teaching and the participant in study and learning.

Components and characteristics of objectives (OBJECTIVE 2)

Components: three are recognized in the objective: *action*, *condition* and *standard*.

Characteristics: must be *specific*, *reachable*, *observable* and *evaluable*. These are directly applicable to the action.

The objectives are the object and guidance to evaluate the training.

The **action** is indicated with a verb in the infinite tense that expresses what the participant will do to demonstrate what he learned. Must be explicit; without action there is no objective. This action must be *specific* and *reachable*, in relation with the work the participant must carry out and for which he is learning. In addition, it must be *observable* in order to be *evaluated*.

Without action there is no objective. See the list of verbs at the end.

In this regard, verbs should be used that indicate actions which can be observed without difficulty, such as name, list, explain, build, disassemble, construct, assemble, design, elaborate, describe, connect, operate, tell, disconnect, draw, indicate, present, recite, erase, tune-in, scratch, execute.

Verbs that express actions that are difficult to observe must be avoided, for example: know, learn, recognize, interpret (except in music), understand, appreciate, value, distinguish, discriminate, judge, visualize.

The **condition** describes the environment in which the action will occur, as well as the instruments and tools to be used. The **standard** indicates the performance pattern or level reached based on criteria of quantity, quality and time Both may be implicit.

Implicit: included in something else without being expressed. The opposite of explicit.

Performance objective, training objectives

Since the purpose of training is to solve problems in executing a particular activity or job, it starts with the description of the work and the requirements to carry it out. Once this information is obtained, whose treatment is not part of the course, the performance objective is drafted.

As in any other type of planning, in training it must start by identifying and defining the problem.

Performance objective: Statement that expresses the combination of knowledge and skills that, upon completion of the training, guarantees execution of a specific activity under particular conditions and with clearly defined characteristics that can be evaluated.

For example: A group of consultants will manage the meetings of municipal authorities that must make decisions on disaster risk management issues. These people have some knowledge of and have participated in this type of activities, but have not received training in meeting organization and facilitation.

In order for training to solve it, the problem must lay in insufficient or lack of knowledge and skills.

The performance required from these people includes:

- developing and updating a record of municipal officials with risk management responsibilities, both planning and operational;
- preparing relevant agendas with concrete topics that will enable adequate time management;
- convening the meetings in a timely manner and facilitating effective meetings;
- preparing reports and instruction to implement approved decisions;

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- establishing follow-up mechanisms and proposing subsequent meetings.

This is the time to define what will guarantee that the participants will do, upon completing the training, to demonstrate they are capable of performing the work.

The performance objective is then developed:

Upon completing the Course and given a simulated situation (condition) participants, within 6 hours and following the guidelines provided in the lessons (time and quality standards), will be able to develop an agenda, convene the appropriate stakeholders, facilitate a decision making meeting on quarterly mitigation and preparedness activities to be implemented with the community, agree on the follow-up mechanism and the date for the next meeting, prepare the report that includes the decisions, assignments and time frames.

This objective shows the results of the job description and the requirements to carry it out.

That is to say, it is a sample at scale of the real performance required that motivated the training and its achievement will be demonstrated at the conclusion.

It is frequently confused with the final evaluation test (FET) of the teaching/learning activity.

The FET is a simulated situation that attempts to reproduce the needs that would arise in a real situation, to which the participants are subjected in order to evaluate how they perform while using what they learned. It must be prepared as soon as the performance objective is completed and drafted.

Knowledge of what the participant will demonstrate (performance) and the requirements to do so, provides what is necessary to know what should be learned and, therefore, what he should be taught. This is how the training objectives are developed.

Training objectives: Statement that expresses the capacities the participant will incorporate during a specific lesson or teaching block.

Notice that while performance is accomplished at the end of the course, training objectives are units such as lessons or teaching blocks and include partial performance.

Below is an example of the training objectives relative to the performance stated above.

Upon completing each lesson participants will demonstrate the following capacities:

Performance may be psychomotor or conceptual (intellectual).

A test is one of the instruments to verify achievement of the objectives.

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1. *Prepare, operate and update a database of the officials that work in disaster risk management;*
2. *List the components of an agenda and the considerations to draft one;*
3. *Describe convening strategies for work meetings;*
4. *Explain decision-making meeting facilitation techniques;*
5. *Draft work communications, instructions and guidelines for operational levels;*
6. *Develop indicators and instruments to evaluate risk management actions.*

The training objectives may include partial performance.

These training objectives will be disaggregated in each lesson and may have other details.

The purpose must be accomplished by the training activity with its materials, method, techniques, instructors and environment.

The performance objective and the training objectives belong to the participants; they are the ones who will demonstrate they have accomplished them.

Development of objectives

Well stated and well drafted objectives describe:

- what participants will achieve upon completing each teaching block;
- what capacity level they will achieve upon completing the course the perform the activity that motivated their training.

It is important to invest time in developing good objectives, as this will benefit both participants and instructors.

Without a doubt, they guide the selection of contents, materials, techniques and anything else that fosters the teaching-learning process.

They facilitate the development of valid and dependable tests and serve as the comparison model to evaluate the accomplishments.

By informing the participant about what he should demonstrate at every step of the process, they guide his attention, participation and study.

When developing the objectives of a lesson, it is advisable to review their components (action, condition, standard) and characteristics (specific, reachable, observable, evaluable). When developing a performance objective for a course, it is preferable for all three components to be explicit, i.e., to be included in the drafting.

In the case of training objectives, the condition and the standard may be implicit.

Based on the components, it is recommended to follow these basic steps:

1. **Action.** Once the capacities needed by the participant are known, ask yourself: what will participant be capable of saying or doing upon completing the lesson?. The answer is the action (or actions) that must be represented by using a verb in the infinitive tense

that describes an observable action, avoiding vagueness. If there is more than one action, it is better to separate them.

Ex.: Upon completing the lesson, the participant will be able to: list the basic contents of a damage evaluation kit.

... will be able to present the conclusions of a case study.

Sometimes vagueness may exist, such as ... will be able to *distinguish* a centrifugal pump from an aspiration-impeller pump. The action *distinguish* is not observable, note the change when saying ... will be capable of explaining the differences between a ... and a ...

See list of verbs at the end.

In this same case there may be more than one action, ... will be able to: A. describe an aspiration impeller pump and a centrifugal pump; B. explain the differences between them; C. list the advantages and limitations of each one.

2. **Condition.** Now the questions are: In what environment will the action develop? Will instruments, tools or other special resources be used?

Ex. ... will be able to present the conclusions of a case study, to the appropriate authorities, in the situation room with the projection equipment for the data show.

3. **Standard.** The question now is: What will be the scope of the action regarding quantity/quality/time? The intent is to define the parameter that will allow, in the evaluation, to compare what the participant accomplished and what was announced he would achieve.

Ex. ... will be able to present, in no more than 45 minutes (time) and using the techniques taught (quality), the conclusions of a case study, to the appropriate authorities, in the situation room with the projection equipment for the data show.

4. **Drafting and verification of clarity.** The objective is almost ready, now the drafting has to be reviewed and handed out to several people (potential instructors and participants) to verify whether they clearly perceive what the author wants to communicate.

If the instructor and the participants do not have an identical perception when reading the objective drafted, it will have to be drafted again.

List of verbs that describe observable actions

Assemble	Execute	Design	Pronounce
Erase	Elaborate	Divide	Plan
Quote	List	Manufacture	Relate
Compose	State	Formulate	Reproduce
Change	Select	Do	Rewrite
Build	Label	Express	Solve
Correct	Use	Manipulate	Indicate
Describe	Examine	Operate	Point
Discover	Explain	Organize	Maintain
Demonstrate	Uncover	Prepare	Underline
Construct	Show	Present	Scratch

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Plan Preparation and Presentation

Upon completing the lesson, participants will be able to:

1. List four key aspects for planning a presentation.
2. Describe the components of a simple lesson plan and three sequence criteria.
3. List six steps for developing a lesson plan.
4. Develop and present a training lesson plan.

Designing training is a process that starts with the detection of a performance problem, then the description of the work and the disaggregation into activities, tasks and steps. It continues with the training needs analysis, which includes interviews with experts, potential users or beneficiaries and the description of their profiles. The result of this analysis provides the information necessary to start the process of developing the materials and the training activity required.

A needs analysis is indispensable to detect whether the performance problem will be solved with training.

This course is not intended to train in design. Its purpose is to improve the capacities of the instructors to whom it is addressed and it is with that intent that it instructs in the preparation and presentation of lessons.

Mastering the contents and having a preparation and presentation plan contributes to the instructor's success in accomplishing his purpose.

The benefits of preparing and practicing a lesson leave no doubt. If in addition, at the time of presenting it the instructor has a guide that will help him do it on time and in a manner with acceptable flexibility, this will increase security and prevent an enthusiastic interaction from causing deviations from the search to accomplish the objectives.

This topic, like the others in the course, is discussed within the framework of training with the interactive teaching method.

Preparation and presentation plan

The teaching-learning process, as defined in the training, gains effectiveness and efficiency when planning exists. A plan is prepared to solve a problem. It consists in clearly stating the objectives and determining the activities, strategies and resources to accomplish them. An information presentation should also be planned.

The plan provides information and programmed decisions but it is likely something unforeseen will arise: an instructor that dominates the issue can deal with this.

Presenting a lesson requires:

- defining what problem will be solved in terms of capacity to be achieved;
- having personal and group data on the trainee;
- preparing a guide to present the knowledge and skills, promoting active and permanent participation of the trainees.

Interactive Training Course (ITC)

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1. Key aspects (OBJECTIVE 1)

1.1 Identification of the problem; preparing a plan always recognizes the same origin: the need to change a situation or, as in this case, a current or initial behavior for another one desired.

In training, the problem is the difference between the capacities the subject needs and those he will accomplish.

1.2 Statement of the objective, definition of the problem; a clear definition of what the subject in training will be able to do and the difference with the initial state define the problem. This allows specifying the type and level of knowledge and skills to be developed.

1.3 Participant's profile. As was mentioned before, a plan consists in determining activities and strategies. For this, it is useful to know some data such as age, sex, schooling level, professional, institutional and social status, that make up the participant's profile. In some cases it will help to consider the type of previous relation between the participants and the instructor; i.e., participant/instructor or instructor/participant subordination.

Knowing the participant's profile facilitates selecting an approach and sequence for treating the topics, vocabulary, examples, support materials and stimulus for participation.

1.4 Lesson plan. Instrument to prepare and present the lesson.

2. Lesson plan and its components (OBJECTIVE 2)

The lesson plan is a working guide for the preparation and presentation of knowledge and skills, in accordance with the objectives, the characteristics of the participants, the training environment and the resources available.

The lesson plan does not replace studying and experience, instead it helps share them; it is useful to dominate the topic.

There are many plan models and formats. The best is the one that allows the instructor to prepare the material and prepare himself thoroughly. It is the one that makes him feel secure and comfortable, as this influences an assured or hesitant attitude in front of the participants. It is the format that quickly, and without needing to permanently have it at hand, helps him maintain the interaction in the correct sense and direction.

Two models are shown at the end of this document.

Regardless of the format, a lesson plan must have the following components: Introduction; Development; Review; Evaluation and Close. They also represent different times during the presentation.

2.1 Introduction

This component is as important as the rest and should therefore be prepared and practiced in detail. It is the time for the instructor to introduce himself and his assistants, the objectives, present information of the materials and equipment to be used, exercises or practice sessions, estimated time for the lesson and the evaluation.

The introduction is the showcase where the virtues of the lesson begin to appear.

Sometimes, to "break the ice" and stimulate attention, an anecdote related with the topic or a very brief story of a successful operation thanks to the capacities to be developed during the lesson may be useful, provided its relevance and appropriateness to the characteristics of the participants has been studied.

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2.2 Development

This is the part of the lesson in which the contents are addressed. These are selected according to the objectives to be accomplished and have to be easily recognizable by the participants as belonging to the context in which their activities are carried out.

They are prepared to be presented to stimulate reflection, reasoning, discussion and interaction, in order to take advantage of the capacities of the participants to build new knowledge and skills.

The sequence may respond to several criteria that are not mutually exclusive. Three are mentioned:

- Specificity: from the general to the specific.

First you teach the concept or global framework and then a particular point. Examples, first you teach the concept of corrosive and then acids and alkalis; first you explain the phases of the administrative process, then the organization phase and later the design of a linear organizational structure with an advisory group.

- Complexity or difficulty: starting from the less complex or easy to the most complex or difficult.

Examples, first you teach the procedure for operating a machine and then how to make repairs; in hazardous material incident response, first you teach how to establish an initial isolation zone that depends on data obtained from the Response Guide, then you teach how to demarcate a protection action zone, a tasks which depends on the application of several pieces of data and the preparation of a design to make a decision;

- Correlativity or correlation: when it is necessary to first transmit certain concepts, data or knowledge in order to understand what follows.

Examples, first you have to teach the components and characteristics of objectives in order to understand how to state and draft them correctly; the classes of fire, which depend on the materials involved, to be able then to select the appropriate extinguisher.

Regarding aids, attention and retention benefit from the appropriate means. That is why you have to take into account the participants' profile, as they may be sensitive to different stimuli.

Auditory memory prevails among some people, who listen intently and learn in this way. Others need to focus their attention and memory by seeing, they need to see the written definitions, graphs and other images that represent the message being transmitted. In general, everyone benefits from audiovisual aids. On the other hand, in each case the instructor preparing the lesson must study which aid will work better for the topic.

Practice exercises are extremely useful. The participant may *know how it is done* but we don't know his level of performance until he *does it*. Including planned exercises must be done at the right time during the development, as it is subject to the sequence criterion adopted. With an explicit purpose, a specific reachable, observable and evaluable objective, adequate

Remember that this topic is being addressed within the scope of the interactive method.

It is important to select the appropriate sequence, but the definitive key will be in interaction through feedback.

Confucius (551 BC-478 BC.) said: I hear and I forget. I see and I remember. I do and I understand.

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materials, clearly explained procedure and sufficient time to carry it out, significant progress can be achieved in a training activity.

In addition to dramatization or role playing, practices and, if possible, rest times for participants, in the development the instructor takes note of the details of the actions, inductions, demonstrations, illustrations and time to carry them out. Once the content has been completely addressed, the review follows.

2.3 Review

This component of the plan is prepared to review what was developed. Doing this in direct relation with the objectives guarantees a focus on the relevant points, avoiding falling into the trap of repeating the lesson. In addition, it orients the participant immediately before taking the test to evaluate whether he accomplished the objectives.

Since it is presented in an interactive manner, feedback provides the opportunity to correct mistakes, reinforce concepts and reaffirm successes.

2.4 Evaluation

Training implies evaluation before (as seen in **Key aspects**), during and after. This component of the plan refers to the exam or test used to verify whether each participant accomplished the objectives of a lesson to satisfaction.

2.5 Close

It is the right time to reaffirm the importance of the capacities accomplished by the participants in the lesson and related them to the performance needed in their everyday reality.

It is important to thank participants for having collaborated in the interaction. Recommend reading to expand on and learn more about the topic, in addition to announcing the following lesson and building a bridge with the one just studied, as this consolidates the credibility of the instructor and lends smoothness to the course.

3. Developing the lesson plan (OBJECTIVE 3)

Having considered the key aspects, the plan is developed. This development is usually part of the training activity. Although, as mentioned at the beginning of this RM, the intent is not to train on this design, simple steps can be shared to prepare a lesson plan. It is important to respect the sequence of the steps, but it may be necessary, as we will see, that when complying with one, the previous one must have to be modified.

3.1 **Drafting the objectives and designing the evaluation test.** This item will take into account the components and characteristics of the objectives and the need for unequivocal drafting. Immediate preparation of the test guarantees focusing on verifying accomplishment of the objectives drafted.

3.2 **Developing the main points.** In this step, it is indispensable to select the substantive information that, when shared with the participants in

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the appropriate sequence, it will serve to consolidate the knowledge and skills that are directly and intimately related with the objectives.

Adding to this information the accessory data to illustrate it, the reference material that will give body and support to the contents of the lesson will be obtained.

There may be a case in which, upon developing the main points, it may be discovered that the objectives, or some of them, are not reachable in one lesson. You must then go back to the previous step to make the appropriate modifications.

3.3 Determine the method, mode and techniques to be used. There is a significant amount of methods, modes, techniques and combinations of two or more of these. Whatever is decided in this step will influence the subsequent ones. This course prepares for using the interactive method, with emphasis on interactive presentation and demonstration/practice modes and the use of association of ideas and creativity techniques. This does not prevent utilization of useful elements from other trends that may enrich the adult teaching/learning process.

3.4 Identify, select, develop support materials. This refers to preparing the support material to be used, such as reference texts, materials to be handed out before or during the lesson, visual aids and others.

The Support Materials and Equipment lesson addresses the details of the different media.

3.5 Organize all materials for the presentation. In this step, everything is organized according to the sequence adopted, the method, the mode and the techniques selected, the strategy for presenting the lesson in accordance with the characteristics of the participants, the facilities and the equipment available.

3.6 Validate the material, review it and prepare the final version. It is necessary to verify whether the lesson, as prepared, teaches what it intends to teach and if participants learn what they need.

The lesson is then presented to a group with the same needs as those that would be subject to the training, with a similar entry level and acceptably uniform.

Once the lesson is presented to this group, if the participants are able to satisfactorily accomplish the objectives, it may be concluded that it is valid.

The true confirmation will come once it is verified that the trainee is able to successfully execute the work for which he was trained.

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4. Lesson Plan Format

There are several different formats. If the lesson belongs to an activity framed within a program, it may follow a standard format designated by the program.

The plan may be written in cards, lined paper or other type of support. One of the useful aspects of the plan is to follow the sequence; for this purpose, some instructors use the visual aids.

In other cases, such as this course, where there is a participant's manual structured with texts and spaces to be filled in, an identical one is prepared for the instructor. It includes the same texts, the appropriate annotations in the corresponding spaces and notes to guide the instructor.

Below is a model:

LESSON PLAN		
PROGRAM _____		
COURSE _____		
LESSON _____		
Time _____		
Resources to be used _____		

Aids	Content	Notes
SL 1-1	1. Introduction 1.1 Introduction of the instructor and his assistant. 1.2 Presentation of the objectives 1.3 Importance of the lesson, time it will take exercises, practices, evaluation.	8 minutes <i>Ask a participant to read the objectives</i>
SL 1-2	2. Development	<i>Give an example and ask for comments</i>

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Below is a page of the Participant's Manual presented as a lesson plan.

1. Performance objective	INSTRUCTOR NOTES
<p>Statement that expresses the combination of knowledge and skills that, upon completion of the training, guarantees execution of a specific activity under particular conditions and with clearly defined characteristics that can be evaluated.</p>	<p>SL 4- 3</p> <p>In this example, mention the actions, the condition and the standard.</p> <p>Work on another example with the participants.</p>
<p>Example <u><i>Upon conclusion of the course, participants will be able to: identify the hazardous material present in a simulated incident and using the Emergency Response Guidebook ERG 2004, demarcate the Initial Isolation Zone and the Protected Action Zone, in no more than 35 minutes.</i></u></p> <p>Actions: <u><i>identify the material, demarcate the Zones</i></u></p> <p>Condition: <u><i>the use of ERG 2004</i></u></p> <p>Standard <u><i>in no more than 35 minutes.</i></u></p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>	<p>Remember the condition may be implicit or not be included.</p> <p>Work on another example with the participants.</p>
2. Training objective	
<p>Statement that expresses the capacities the participant will incorporate during a specific lesson or teaching block.</p>	<p>SL 4- 4</p> <p>The training objectives are goals related to the performance objective.</p> <p>As an example, ask a participant to read Objective 2 of this lesson.</p> <p>Ask the group to write an objective; the initial part of the statement should be: <u><i>Upon completion of this lesson, participants will be able to ...</i></u></p>
<p>Example <u><i>Upon completing the lesson, participants will be able to: define Training, describe three teaching methods the five elements of the Interactive Method.</i></u></p> <p>_____</p> <p>_____</p> <p>_____</p> <p>Well stated and well drafted specific, reachable, observable and evaluable objectives, are indispensable to guarantee the solution to a performance problem through effective training.</p>	

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Verbal and Non-Verbal Communication Skills

Upon completing the lesson, participants will be able to:

1. Define communication and public speaking;
2. Explain the function of the instructor;
3. Describe eight key aspects of preparation and presentation; and
4. Develop a presentation applying the skills learned in the lesson.

In *Proceedings of the National Academy of Sciences (May 2007)*, researchers Amy Pollick and Frans de Waal, Yerkes National Primate Research Center, in Atlanta (USA), said that chimpanzees and *bonobos*, small monkeys from the Congo, give great importance to gestures, in addition to using sounds and facial expressions as a communication system.

They use more gestures with hands and feet than facial expression and vocalization.

A scream always means that something is under threat or attack. But the gesture of extending open palms depends on the context. During a fight, it is used to request help from another animal. But it can also be used with food as a suggestion of exchange with another chimpanzee.

According to Marc D. Hauser, Harvard expert in animal communication, human use of gestures is not linguistic, but rather improves language. Hauser believes that at some point in primate evolution, hands turned out to be useful for communication and humans inherited some of this.

Communication (Objective 1)

In the field of teaching-learning, there is a clear and precise expression defined as the *exchange of understandings between two or more people*.

En 1948 Claude E. Shannon published a book called "The Mathematical Theory of Communication". According to Shannon, the problem of communication consists in reproducing in a given point, in an exact or approximate form, a message selected in another point. His best known theory states that communication is based on a linear system represented by a chain with the following elements: the *source* (of information) that produces a *message* (words on a telephone), the *codifier* or *issuer*, who transforms the message into signs in order to make it transmissible (the telephone transforms voice into electric oscillations), the *channel* which is the medium (telephone cable) used to transmit the signs and the *decoder* or receiver, who reconstructs the message based on the signs.

The need to receive a response and verify what was perceived by the receiver, implies that communication is, at least, bi-directional.

Communication occurs when the perception of the receiver is identical to that of the issuer. That is why it is said that the perceptions of the receiver and not the intent of the issuer govern what is understood.

Gestures are so integrated into human communication that researchers wonder whether language started as a gesture sign system and then changed to an oral system with evolution.

Shannon, mathematician and electronic engineer was a researcher at the Bell System Labs, a subsidiary of American Telegraph & Telephone (ATT)

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Former Chilean President Lagos, referring to author Claudio Magris, said: You start a dialogue with the intent to convince and the willingness to be convinced. Dialogue also implies dissent, the force of two opposing truths and its purpose is to find some degree of agreement in the end. A good dialogue concludes with the start of the solution to a problem.

Public Speaking (Oratory) (Objective 1)

Art and technique of expressing oneself properly, of pleasing, persuading, moving and convincing with words, it is one of the forms of communication used in teaching-learning processes.

It is intimately related to rhetoric. Its measured use also involves the written language and emphasizes the action of ensuring the beauty of the expression.

Function of the Instructor (Objective 2)

The instructor must have a notion of oratory that will help him motivate, persuade and please the participant (trainee), guiding him/her through a simple, entertaining, productive and well-focused learning process. In order to accomplish this, he/she should take several factors into account.

It is understood that communication and oratory are important concepts in training presentations, both in aspects related with the **preparation** of a training presentation as well with those of the **presentation** itself. (Objective 3)

Preparation

In preparation, it is indispensable to have a clear **purpose**. Instructor and participants must know what is the intent, as well as the motive and needs that justify the presentation. It is necessary for the instructor to know the characteristics of the **participants** including age, sex, level of education, beliefs, customs, traditions and anything else that may contribute to provide an effective and efficient presentation, avoiding errors that may cause the failure of the stated purpose.

The information and data that will comprise the **content** must be selected very carefully. Verification of its relevance in relation to the purpose, sufficiency, accessibility and possibility of delivery within the **time** available is another task for the instructor.

Support material selected or prepared in the right amount, taking into account the purpose, participants, content and time, may contribute by making the topics more accessible and improving attention, which will facilitate reception and retention of the training received.

The **facilities and equipment** of the venue of the presentation influence the acoustics, visibility, movement of the instructor, assistant and participants, and the possibility of projecting texts and images, whether animated or fixed.

Rhetoric: the art of speaking well, of embellishing the expression of concepts, of giving the written or spoken language the effectiveness to please, persuade or move.

Time management is rarely given the importance it deserves.

Excessive images may reduce the richness of the interaction.

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One of the aspects that contribute to the participants' first impression is the **attire** worn by the instructor. Simplicity and moderation are recommended. Dress to win and comfortably, but keep in harmony with the locale.

Regardless of the experience and mastery the instructor may have, it is always advisable to **practice** in order to rehearse, review and make sure all aspects mentioned have been taken into account.

The instructor must:

- prepare the materials sufficiently in advance;
- keep his notes "clean", complications may arise if too much text has been underlined or highlighted;
- stress only key points;
- practice the presentation out loud and using the aids;
- ensure he is convinced of the concepts he will transmit and that he masters the topic;
- be prepared to recognize limitations and say "I don't know" and, if appropriate, commit to finding out and follow through.

It is an important advantage to be able to correct mistakes and present him/herself with assurance in front of the audience.

Presentation

At the time of the presentation, the trainees will perceive, in addition to the attire, the **attitude** of the trainer. He must transmit confidence and security.

He must create a nice, cordial atmosphere, appropriate to fulfill the purpose, maintaining a **style**, that is, a behavior all his/her own. Style is the "own" character an artist gives to his work.

He/she must generate and transmit **energy** demonstrating a capacity to manage the scene from beginning to end. He/she shall be **dynamic**, moving on the stage as "a fish in the water" to quickly tend to the needs of the participants.

This energy and dynamism should be accompanied by natural **gestures**, to support and reinforce the words, but measured, without agitation or violence. Hands should not be hidden or tied, they should move naturally, as they usually move.

Eye contact clearly identifies the targets of the message and expresses the importance they are recognized for the respect they deserve.

It should be encompassing and permanent, to include all participants in the teaching-learning session, to demonstrate the interest in knowing how they are doing, how they feel, knowing if their expectations are being met. It allows understanding of whether there is interest or doubts, questions, enthusiasm, tiredness or others.

Practice offers opportunities to correct mistakes and ensure mastery of the topic.

It is helpful to express happiness for being there and talk to the people convinced of what you are saying.

Showing the best of oneself is better than the most perfect imitation.

It is common to see speakers "tied" to the podium and others that look like their shoes were nailed to the floor.

The view of the whole helps perceive the state of the human environment.

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A common interruption of eye contact, which should be avoided, is to turn your back on participants, talking to the board or the flip chart while you write or to the screen while you comment on a slide.

It is also necessary for the instructor to verify, through facial expressions and body language, whether the participants' **perception** matches his/her own.

Paraphrasing Cicero:

Every passion of the soul has received from Nature, so to speak, its appearance, sign and sound, and the entire human body, its appearance and its voice sound like the strings of an instrument, when passion strums them.

Voices, like the strings, are taught and respond to any touch: one is high, another grave, one fast, the next one slow, one large, another one small; nevertheless all of them can accommodate intermediate variations.

This is where tones are found: soft, course, rapid, diffuse, continuous, interrupted, broken, swollen, attenuated, etc. there isn't one that cannot be treated with art and moderation.

Voice must be followed by gestures; it is not a scenic gesture that expresses every word, but declares not by demonstration but by meaning, the fullness of the idea.

But it is the face that summarizes everything and the main feature are the eyes.

The soul inspires action; the face is the mirror of the soul; the eyes are the interpreters; only they can move so much and change like the passions of the soul and no one can do this by always looking at the same object.

With the eyes, whether alert, subdued or happy, we signal the movements of the soul, more accordingly to the nature of the speech.

It is action as the tongue of the body and that is why it should always follow thought.

The **voice** must have sufficient *volume* to be heard from any place in the room, without shouting or using microphones, as the environment and the dynamics of interactive training require it. A *tone* without excessive highs or lows, but with the required *inflection* to avoid monotony.

Demosthenes (383 BC) was one of the great orators of ancient times. With great force of will and consistency he corrected several of his defects. He strengthened his chest with long runs.

His difficulty in pronouncing the "r" made him place stones in his mouth while trying to pronounce clearly and improve his diction.

He was thought to look ridiculous for his habit of repeatedly raising a shoulder while he spoke. Practicing in front of a mirror, with a sharp sword over that shoulder, he was able to avoid that movement during his presentations.

Careful intonation that "gives life" and increases expression and inflection to announce, warn, claim attention, emphasize, affirm, please, deny and gratify, together with well-articulated *diction*, make a presentation shine and entertaining.

Marco Tulio Cicero
(106 BC-43 BC)
Roman writer, orator
and politician.

Cicero unmasked
Catiline's attempted
spell in the discourses
known as the
Catilinarians. His
doctrine on oratory can
be found in the treatises
De Oratore and Brutus.

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«What was impressive about Lacan's seminar was the kind of irradiation, of dominance, of power over the audience that emanated from Lacan's physical person, from his diction, and from his gestures...»

... My impression was that Lacan acted on the audience not only because of what he said but also because of another extraordinarily difficult thing to define, something imponderable, his presence, the timbre of his voice, the art with which he managed it...».

The **vocabulary** must be in accordance with the topic and the characteristics of the participants, without abusing slang and striving to raise the level.

An instructor with a good handle of synonyms will be able to express the same thought in different ways (paraphrasing) when the need arises to explain words and new or unusual procedures in some environments.

Words with unpleasant or funny connotations and double entendre should be avoided.

Good use of language requires not using crutches or making sounds to fill gaps, calm nerves or dissimulate ignorance or forgetfulness. Precise expression requires clear, robust, well-founded thoughts. In training, mastery of the topic is obviously indispensable.

Reality is constantly changing and a new presentation means a new personal experience, other people with their own experiences, another framework, other circumstances. So, even if the same topic has been presented before, preparation is required. An important part of this preparation, in addition to studying, is **practice**.

Practicing the **pace**, lively to prevent wavering attention but slow enough to be able to guarantee good following by the audience. Calculate timely pauses to allow reflection by the listeners and mental review by the speaker to be able to go on with assurance, managing the time.

Gestures should be in agreement with the words, supporting understanding and incorporation of ideas, concepts, definitions and emotions. Avoid stereotypes, imitations, objects in hands, abrupt or exaggerated gestures. Maintain your own style. Show you feel comfortable, calm, receptive, sure and natural. Focus words and actions on satisfying the needs of the audience, capturing their attention, creating an environment conducive to asking and contributing, responding to their expectations.

The **support material** will be used as necessary to capture attention, facilitate explanation, refresh and establish concepts, procedures and others. Care should be exercised in projecting a visual aid in not crossing between the light from the projector and the screen. The shadow projected, in addition to hiding the intended image, will become a powerful distraction for the participants.

A presentation of French psychoanalyst and philosopher Jacques Lacan motivated this comment by Odille Baron de Supervielle, writer and literary critic.

Words have connotations, that is, they contain a certain amount of meanings beyond the object or circumstance denoted. Table denotes a known physical object, but may have a connotation of food, family, work, meeting, negotiation.

Another lesson will discuss the characteristics support materials should meet, including relevant, well-prepared and presented in a timely manner, as well as the necessary equipment.

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As mentioned above, it is not right to “speak to the screen” either; you look at what is on the screen and comment once visual contact with the participants is reestablished. It is the same with the board and flip chart.

Increasingly the mass media, now transformed into multimedia (newspapers, TV, cinema, Internet), are replacing words with images. This has an inherent risk of losing the conceptual, abstract language which is richer in meanings, with deeper connotations.

It is undeniable that the exchange of understanding that defines communication, may be facilitated by giving careful attention to verbal and non-verbal expressions. It is therefore necessary to develop the ability to create images using words and gestures. This skill may be improved by reading, studying, practicing and taking advantage of each in person presentation.

This is essential to promote and maintain **participation** which, through *interaction*, can facilitate sharing information and generating ideas, knowledge and skills to solve the participants’ performance problems.

In the teaching-learning process, exercises are often used whose development is related with the objectives stated and are expressed in specially prepared instructions.

The special value of the previously defined concept of communication, can be appreciated in the instructions. The **instructions** must be an Exchange of understanding between instructor and participants, or else the advantages of an extremely useful training tool will be lost.

To obtain the maximum benefits of a carefully prepared and resented lesson, care should be taken to elicit effective and permanent participation and **distractions** should be avoided. Highly decorated uniforms, insinuating miniskirts, noisy jewelry, pictures of heroes and leaders, souvenirs from exotic places, indiscrete windows, distribution of excellent training materials at the wrong time, may ruin all of the instructor’s work.

Finally, it is necessary to recognize that, even when being fully prepared, it is normal to feel the prickling of nerves prior to starting the presentation. When this happens, breathe deeply, exhale slowly and remember:

- in order to say what you think you have to think before speaking;
- don’t rush, take your time before speaking, pause, the audience also needs to be prepared to listen;
- show willingness to listen to questions (without interrupting), reformulate them if necessary, before answering see if the group can answer them, listen to comments and learn.

Once the lesson has started, enjoy the wonderful experience of learning and teaching.

Interaction is expressed in joint construction of knowledge and skills.

Keeping a pointer, pen, papers, coins and other items in your hands will not help focus attention or foster interaction.

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Support Material and Equipment

Upon completing this lesson, participants will be able to:

1. Define support materials.
2. List four basic standards of the visual aids more widely used.
3. Describe two aids that don't need electricity to be used and two that do.
4. List three projectors of visual aids.
5. Develop visual aids and use them effectively in a training presentation.

All of the methods and techniques utilized in training use materials to support the presentation of contents, examples, exercises, demonstrations and practice.

Support materials (OBJECTIVE 1)

A complement to the presentation that, through objects and real environments, text, graphs and other fixed and moving, real or simulated images, reinforces incorporation and retention of contents.

The first thing that should be noted is support materials do not replace command of the topic and much less preparation and instructor skill to interact with the participants effectively and efficiently to accomplish the desired change of behavior.

In an Interactive Course, it is recommended to identify materials as follows:

- PW** Pre-Work (*preparation of participants to level-off knowledge*)
- IM** Instructor's Manual (*includes Lesson Plan, RM and others, as necessary*)
- PM** Participant's Manual (*interactive document for reading and taking notes*)
- RR** Reference Material (*document describing the contents of the Course*)
- DM** Distribution Material (*circumstantial and specific support handed out immediately before, during or immediately upon conclusion of the lesson*)
- E#** Exercise N° (*activity to practice knowledge and skills*)
- ET** Evaluation Test (*verification of accomplishment of performance objectives*)
- FET** Final Evaluation Test (*verification of accomplishment of performance objectives*)
- FC** Flip chart
- SL** Slide
- BD** Board
- TR** Transparency
- VD** Video
- CD - DVD**
- DS** Data Show

The number and diversity of materials make it necessary to use simple denominations for their organization and management.

All of these materials support the teaching-learning process, many of them require design and development capabilities and teaching them is not part of the purpose of this course.

This lesson only addresses visual aids and the equipment to present them.

The lesson on Evaluation contains some details of the complexity of the design.

Although the correct, planned, timely and quantified use of relevant materials facilitates the instructor's job, the most important aspect is that he promote interaction and make a significant contribution to the teaching/learning process.

Selection and preparation must be made estimating how much they contribute to the accessibility and understanding of the contents, as well as the development of new knowledge and skills to be translated into the desired performance.

Accessibility refers to facilitating the understanding of what is intended to be shared.

The reason for using them is to focus the participants' attention; they will more clearly understand what is explained, clearly see the relation between what is taught and what they need for correct performance. Another aspect to consider is the knowledge the trainee has about his own predominant characteristics of visual or auditory memory, preference for graphics, sketches and photographs, rather than for reading text.¹

Visual, auditory and other skills can be developed.

Basic standards for a visual aid (OBJECTIVE 2)

In addition to being prepared and selected taking into account the objectives and the trainees, planning their presentation, presenting them in a timely manner and in the right amount, there are quality details that have to be respected.

These are as follows:

1. Should not take the spotlight away from the interaction.
2. Should facilitate:
 - presentation and interaction for the instructor; and
 - accessibility and understanding of contents for participant.
3. Sketches and drawings must be visible from any point in the room.
4. Hand written or projected words must be at least 4 cm tall, in print, without frills (*sans serif*), texts in upper and lower case. In order for words to be visible on the screen, minimum font on the slide should be 18 pt (0.5 cm).
5. Lines: maximum 10 for flip chart, 8 for slides.
6. Must address key points of a single topic.
7. Not too much text.
8. Simple graphs, linear art.
9. Relevant illustrations suitable for the topic.
10. Use of appropriate colors; black and blue, red for emphasis.

The use of visual aids also relates to the number of participants, the classroom and the arrangement of chairs and tables for the participants (described under Facilities).

Leave a minimum of 2.5 cm between lines in the flip chart.

Psychological studies attribute the following characteristics to colors:

Yellow, kindness
Blue, peacefulness
Purple, formality
Red, danger
Green, wellbeing.

Visual Aids Most Widely Used

Aids that don't require electricity: board and flip chart. (OBJECTIVE 3)

Board

Dark board (black or green), where you write with chalk. It may also be a white board, where you write with special easily erasable markers.

The dust resulting from erasing a chalk board may be bothersome, especially for people with allergies.

¹ Development of visual skills is described in *Aprendizaje dinámico con PNL*, Dilts, Robert, Epstein, Todd, Ed. Urano, 1997.

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The best known and most widely used in schools and universities. Using a chalk board is inexpensive. White plastic boards are more expensive and require special markers.

It may be erased and used again indefinitely. Fixed ones may not be transported. Since in order to write you have to erase, information cannot be stored. Very limited capacity for preparing visual aids in advance.

Flip Chart

Stand to support large paper, approximately 70/90 x 100/120 cm.

May be improvised on a board or other support by posting paper sheets with masking tape.

The paper used may be newspaper, poster board or other that is not too absorbent. Self-adhesive paper (post-it) is now available.

To write and draw special markers are needed, preferably with wide tips. It can be prepared in advance. It can be stored and reused, remove the stand and tape on a wall or board to keep it in sight. It can save information until the lesson is completed and beyond.

Tricks

Write or draw softly in pencil before the presentation so participants can't see. During the presentation, the instructor or a participant writes with a marker over the pencil script.

Reveal gradually: fragments of paper that cover text and drawings on a topic, are removed when moving from one point to the next.

Finding a topic quickly: when there are many written sheets on the stand, on the edge of the sheet of each topic you can place a piece of masking tape with a title, number or other signal.

Aids that require electricity: transparencies, transparencies (in disuse for the interactive method), videos, data show (OBJECTIVE 3)

Transparencies

Images printed on transparent material (acetate) by photocopying, ink jet, laser or markers.

There are acetates for ink and laser printers and for writing with markers. Electricity is required for the overhead projector.

Tricks

Superimpose a blank acetate over one that contains, for example, a map and draw marks, arrows, circles, etc. When you remove the top acetate, your image will continue to be clean.

Prepare a base TR with one datum/graph and more with two or more data/graphs can be added on top.



OVERHEAD PROJECTOR

With the operator facing the projection glass, the TR is placed in a position where the operator can read it. During the presentation, it is advisable to turn it off to change each transparency. The lamp lasts about 60 hours. There are several types of overhead projectors, and it is therefore a good idea to carefully read the manufacturer's instructions. Some devices turn off when the lamp gets hot; they remain ventilated and turn on again upon reaching the correct operation temperature.

It is difficult for a person to know how to operate all overhead projector models.

Video

Excellent for real images, movement and sound. Requires a video player to be presented on a monitor. Professional editing is important.

Used as an aid, it should not take up more than one sixth of total presentation time.

If the instructor will not be using his own equipment, he may want to request assistance from someone experienced in using the equipment available for the presentation.



VIDEO PLAYER

There are several video formats (NTSC; PAL-N; PAL-M; etc.), but most devices now are multi-standard and adjust automatically to the format. They are well known, as they have been used in homes for many years. It is currently being replaced by DVD.

Data show

Currently, the most widely used together with the PowerPoint program. The interactive method tries to limit to a minimum any animation and sound that is not strictly justified in the need to help understand or illustrate a topic.

The instructor must be skillful, as this aid may work against interaction. Poorly used, it becomes a distraction rather than support.

These media are seductive and tempting due to their versatility; it is important to have sufficient space for person to person communication with the participants in a productive interaction to build knowledge.



DATA SHOW PROJECTORS, enable

computer-based presentations, although some newer devices no longer require them.

Sometimes computers and projectors are incompatible. A technician may be need for correct operation.

Screen

There are several types, it is important to:

- unfold and fold them very carefully;
- place and adjust it for a clear image, without deformation;
- not push fingers and hands or wood or metal pointers into it;
- not write on its surface.

Distance between participants/projected image

To comfortably observe the projected image, the participant closest to the image must be at a distance of no less than two widths of the projection and the participant farthest must be at a distance no more than 6 widths of the projection.

Recommendations for operating projection equipment

It is unlikely the instructor will be familiar with and able to operate all types of projection equipment correctly. But he/she should have a basic knowledge that will allow him/her to quickly understand the instructions read or transmitted by a technician or a person that knows how to operate the projector provided for the presentation.

It is always a good idea to verify, before the presentation and sufficiently in advance to correct any failure:

- special manufacturer recommendations
- operation voltage
- cleanliness
- switches (on/off)
- connections
- spare light bulb
- lens focus and other adjustments to image
- correct placement of material to be projected.

Visual and Audio Aid Summary Table

Type of support	Minimum equipment to be used	Resources necessary	Physical environment	Comments
1. Projection of transparencies	Overhead projector Screen	Electricity Acetates Markers	Natural lighting without limitations	Markers may be permanent or washable
2. Projection of slides	Slide projector Screen	Electricity Slides Spare carousel	Requires darkening the room	
3. Projection of data show	Data show projector Computer Screen	Electricity Disks with information	Does not require full darkness but is not as powerful as SL projection	Some projectors do not require a separate computer. Each system has a particular configuration

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4. Video * two configuration options.	TV and video player (DVD or other) DVD and data show projector	Electricity Cartridges or disks as the case may be	Does not require total darkness. Size of the group depending on the equipment or screen	Large screens have limitations in lighted environments
5. Flip chart	Flip chart stand or easel	Paper markers	Medium-size groups. May be used outdoors.	Permanent markers. There are different types of paper.
6. Writing surfaces (BD)	Board (dark or white)	Markers. Chalk.	May be used outdoors.	Chalk (for dark board) Special markers (erasable)
7. Audio reproduction	Audio system	Records or cassettes	Without limitations depending on the system	Audio material is limited to a single channel (hearing)
8. Real objects, models and mock-ups	Depending on specific support	Depending on specific support	Depending on the support, it may be the most versatile and experiential option	Depending on the model, object or mock-up, each participant may have own support, work in groups or stations

Facilities, Furniture and Logistics

Upon completing this lesson, participants will be able to:

1. List six basic requirements of facilities, furniture, services and supplies for an interactive lesson.
2. Arrange the participants in a manner that achieves visibility and interaction between them and with the instructor.

Training presentations in the interactive method require a limited number of participants (21, maximum 24) and facilities that allow adequate distribution of furniture and support equipment. It is also necessary to have an acceptably comfortable physical environment and the provision of basic and indispensable services and supplies.

When there are more than 24 participants, the interaction is seriously affected.

Basic Requirements

1. Facilities

Although facilities with ideal conditions may not always be available, they should try to meet the following:

1.1 Dimensions

Depending on the interactive training mode used, physical resources and other factors, the dimensions may vary.

When considering an interactive presentation or demonstration and practice that does not require real large objects, a classroom for a minimum of 24 people with tables, chairs and projection equipment, considering a U-shape arrangement (see below) should have at least the following dimensions:

SPACE	meters
Between the front wall and the first row of tables	3.00
Between lateral rows of tables	2.00
From lateral tables to the wall	1.00
Between the back wall and the last row of tables (with chairs)	2.70
Writing space on the table (per person)	0.70

Ideal facilities are not always available, try to find whatever is closest to ideal

Generally speaking, for the context presented, three more spaces are necessary.

Two for exercises, with capacity for a maximum of 8 participants plus 1 instructor, with tables, chairs, a flip chart and a screen. The third would be used by the secretariat and storage of materials, equipment and supplies.

It is advisable for tables and chairs to be easy to move, to facilitate rearrangement as necessary.

Some trainings require more space and other special environments and facilities. Others require working outdoors.

1.2 Access

Training facilities must be located in an easily accessible location. This contributes to the wellbeing of participants, support personnel and instructors and helps the teaching-learning process.

Regarding the classroom, it is desirable for the main access to be behind the class participants. If someone needs to go in or out, it can be done without disturbing the instructor and the participants. In addition, there should be an emergency exit.

It is interesting that in schools and universities, the door is located at the front, where the board and the teacher are.

Ideally, the possibility for disabled people to attend should also be considered as well as emergency exits with doors opening outward.

1.3 Controls

This item refers to the location of the electricity panel, light switches, air conditioning, projector operation panel, monitors, audio equipment and others.

These may be located in a place where the instructor and his assistant can operate them comfortably. Other times, given the requirements of the interactive method and the mode to be used, participants will be distributed in such a way that it will be necessary to find an alternative that will guarantee good presentations.

1.4 Acoustics

Construction or selection of a classroom does not always take this aspect into account.

An important point is insulation against external noise. Take into account proximity to factories, clubs, schools.

Inside the room, it is obviously important that a voice, at a volume appropriate to the space, should be clearly heard and understood from any point in the room. In interactive training usually this doesn't cause too many problems, as the size of the groups make it possible.

Should a microphone have to be used, it should leave the hands free (i.e., lapel or lavalier microphone)

Resonance is sometimes a problem in very large rooms which perturbs or prevents understanding what is said. On occasion this may be corrected by using divisions or heavy curtains.

1.5 Ventilation/Air Condition

Ventilation should be natural. Avoid situations where the room is too cold or too hot and verify if there are ways to keep pleasant ventilation and temperature.

Air conditioning and lighting controls should be handled by the assistant or a specially designated technician.

1.6 Lighting

Same as with ventilation, better if it is natural. However, presentations in evening schedules may require artificial lighting. Avoid devices that cause noise such as reactance of fluorescent fixtures.

Currently there are devices that offer sufficient and pleasant light to read comfortably. It is ideal to have the possibility of dimming the lights near the screen where the aids are projected

If there is excessive natural lighting during the day, there should be curtains.

1.7 Decoration

Soft colors on walls and curtains enhance comfort. It is advisable for walls to have space for posting flip chart paper with masking tape that contains information that should remain visible.

Avoid mirrors, pictures, portraits, trophies, shields, weapon exhibits, machines, etc.; these are distractions that interfere with the interaction.

1.8 Visibility

There should be full visibility from all points in the room between participants, the instructor and the aids.

Columns, decorations, furniture fixed to walls or floor, may be obstacles to visibility in some sectors. These create absolute limitations for participants in the interactive presentation or demonstration/practice modes.

1.9 Hygiene

Classrooms and other areas should have containers for any waste generated. Should be ventilated and cleaned every day.

1.10 Safety

Corridors, exits, meeting points, must have clear signage.

Safety details must be observed at all times and are particularly important in locations susceptible to hazards, i.e., seismic risk.

2. Furniture

2.1 Tables and chairs

Taking into account that there will be a lot of attention, participation and interaction, sometimes extensive, tables and chairs should be sufficiently comfortable. Avoid designs that induce relaxation or sleepiness.

In case there are no tables, school desks may be used. Tables and chairs that can be moved without too much effort are preferable. Some presentations, sessions and exercises don't require tables and others don't use either tables or chairs.

Ergonomic chairs are sometimes recommended; they are comfortable but may affect attention.

2.2 Projectors, screen, accessories, tools

Aids such as slides, videos, data shows require equipment for presentation. The table or furniture where the projection equipment is to be set up in a way that does not interfere and provides good visibility for all participants. This is true for the overhead projector, data show projector, video player, monitor and screen.

The equipment may also need furniture for safe storage, together with extension cords, adapters, transformers and tools.

3. Services and Supplies

3.1 Rest rooms

Close to the classroom, for men and women, clean and well-ventilated. Must have liquid soap and automatic hand drier or paper towels.

3.2 Water, breaks, food

Safe drinking water must be available all the time. Depending on location and tradition, other non-alcoholic beverages may be served. Breaks should be frugal breaks.

In case lunch is offered, a light meal will reduce the risk of sleepiness in early afternoon hours.

3.3 Office equipment, paper, writing materials

Make arrangements to have available:

- scissors, rulers, stapler, two- and three-hole puncher, pencil sharpener;
- paper (A4 or letter size, flip chart paper and cardboard for diplomas), pencils, markers, adhesive tape, masking tape.
- computer, printer, photocopier or access to photocopier, camera (group and individual photos, shots during the course).

The appropriate diplomas or participation certificates will have to be prepared, as well as a directory of participants (may be with the group photo and of each participant and instructor), and a course report with the evaluation and comments from participants and instructors (see samples at the end).

Arrangement of tables and chairs

Arrangements that enable training with the interactive method

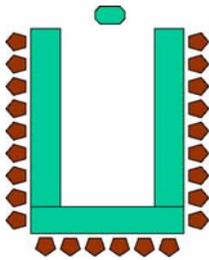
As mentioned before, in order maintain very good visibility and occupy only the furniture that is strictly necessary, participants will be arranged in accordance with the activity, the mode and the techniques.

It is common to face difficulties in finding a table on which to set up an overhead projector without affecting visibility.

To prevent accidents and distractions, place water and glasses on an accessible table inside the room. It is prudent to avoid placing water, food or coffee on the work table.

It is easy for the instructor to carry at least "school supplies" that may help him out at any time.

U-SHAPE



Good visibility.

For IP and D/P training modes of between 12 and 24 people.

Also for information meetings.

There are other arrangements; the three presented are most commonly used in interactive training.

V-SHAPE

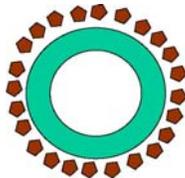


Good visibility.

For IP and D/P training modes of between 8 and 14 people.

Also for information meetings.

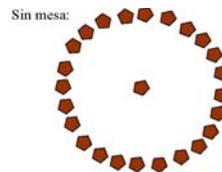
O-SHAPE WITH TABLE



Good visibility.

The instructor is better integrated into the group. For IP and D/P training of 8 to 12 participants. It is rarely used for larger groups, but could be for up to 24 participants.

O-SHAPE WITHOUT TABLE



Useful for information meetings.

With table when it is necessary to take notes or work with a manual.

Without the table when the activity requires avoiding an interpersonal barrier. Often used in exercises to foster interpersonal relations. Also for techniques such as Phillips 66 where a problem is presented to 6 people who must present their conclusions in 6 minutes.

SAMPLE OF COURSE REPORT

COURSE REPORT: BAGER

Place and Date: El Montero, Río Cálido, August 30 to September 1, 2006.

Organization and funding: Municipality of El Montero

Number of participants	20	17 males – 3 females
Sponsoring Institutions Volunteer Firefighters El Montero Hospital Luis Sauternes Environment Council Local Forest Firefighting Service Air Force - El Montero Air Force - Río Cálido Gendarmerie (police) Regional Security Council National Emergency Plan Civil Defense Río Cálido Civil Defense El Mocho Civil Police	3 2 1 3 2 1 2 1 2 1 1 1	Varied multidisciplinary participation Balance between municipal, regional and national personnel Presence of motivated team from Local Forest Firefighting Service Contribution of one representative Regional Security Council One representative of the Environment area Guests from neighboring areas in the region No representatives from the social area.
Passed the course (17 males, 3 females)	20	Very good: 20 %; Good: 40 %; Regular: 40 %
Evaluation, average, deviation Scores awarded by participants		Content, between 8.54 and 9.25 Instructors, between 8.24 and 9.09 Instructors as team: 8.68. Method: 8.58. - Course: 8.97.
Local Coordinator Mr. Walter Sorianes	1	Very good logistics support. Facilities must be improved.
Monitoring and Support Deputy Commander Daniel Aguterio Instructors (from VFF instructor team) Rosa Luque Leonardo Zapalar Bartolomé Ricalderio Amelia Guetzav Ricardo Zalazar		Responsible and integrated instructors. Good performance by Aguterio. Adequate leading of exercises. Good content management by Ricalderio. Needs to polish strategic group management aspects. Luque, still nervous and insecure, must improve articulation of concepts. Zapalar with good content management but must be more formal and be present throughout the course. Guetzav, his very fast-paced and vehement style hurts interaction.
Observed output Motivated and participating groups. Good final product in one group, acceptable in another and poor in the third (difficulty in integrating)		<u>Instructor candidates</u> Lead: <i>H.Caraveti, C.Dorivao.</i> Alternates: <i>H.Manclet, M.Conde, B. Sesta, E.Pérez, J.Sociel.</i>
Proposed follow-up Verify use of the tool in local plans. Invite some outstanding participants to workshop.		Facilitate training of local instructors. Reinforce training team with review and update workshop.

COORDINATOR: Mr. Walter Sorianes

SAMPLE OF COURSE DIRECTORY

Course:

Place and Date:

Organized by:

DIRECTORY

PARTICIPANTS	PERSONAL DATA	PHOTO (optional)
Surnames: Dieguez Barbosa Names: Ricardo Román Identification No.: (optional)	Profession: Electrical technician Occupation: Head of maintenance Sponsoring Institution: Volunteer Firefighters Villa Cardón. Institution Address: Route 153, Km 96 ZC: 8888 – E-mail: bbvv@cardon.com.ar Tel. Instit. 0436 154326 Home Address: Manz.6 Casa 22- B° Acacias Tel. Home: ----- Mobile: 0436 90 09901	
PARTICIPANTS	PERSONAL DATA	PHOTO (optional)
Surnames: Names:	Profession: Occupation: Sponsoring Institution: Institution Address: ZP: – E-mail: Tel. Instit. Home Address: Tel. Home: Mobile:	

SAMPLE DIPLOMA

 USAID <small>FROM THE AMERICAN PEOPLE</small>		
<p>Escuela Superior de Bomberos de Villa María-Instituto Alfredo Angeli Firefighters Volunteer Firefighting Crops of Villa Carlos Paz USAID/OFDALAC Training and Technical Assistance Program</p>		
<p>Certify that</p>		
<p><i>Rolfe Ulm Svendseck</i></p>		
<p>satisfactorily accomplished the objectives of the Inteactive Training Course (ITC), presented from __ to __ of _____, _____.</p>		
<p>Issued in the city of Villa María, Córdoba, on the __ of _____, _____.</p>		
_____ USAID/OFDALAC	_____ ESB/Instituto A. Angeli	_____ Bomberos Voluntarios V. Carlos Paz

Evaluation and Tests

Upon completing this lesson, participants will be able to:

1. Define evaluation.
2. Explain the difference between performance evaluation and knowledge evaluation.
3. Describe why, what, when and how we evaluate.
4. Name two examples of objectives tests and two of subjective tests.
5. Define *validity* and *reliability* of a test.

As far as we can remember, systematic education included, and in some places still includes, an evil component: tests or exams. Traditionally, these have served more to terrorize those who had to pass them and to develop all sorts of cheating, than to verify the results of teaching.

It is enough to remember the tests and exams in school, high school and college.

Rarely have students been able to know what was expected of them during the course, to be able to distinguish between the important and the accessory, the fundamental from the trivial.

Efforts are now emerging to base teaching on well-stated objectives. These objectives must be made known to the trainees before the start of the lessons.

Training is a teaching-learning process designed, developed, presented and evaluated in such a way as to ensure lasting acquisition of knowledge and skills, applicable to productive activities, whether of psychomotor or intellectual predominance. It is evident that training, from its beginning as a process, is directed toward solving a performance problem.

When it is shown that a problem is based on the need for training and a decision on design is made, the people in charge must state:

- expected behavior, in terms of observable actions;
- conditions under which the actions are to be executed; and
- performance pattern that will be considered acceptable.

In any problem, it is true that once it has been defined, it has been half solved.

Another need arises immediately: deciding how to verify that the recipient of the training has been trained in the expected behavior and if he meets the expected performance pattern. The evaluation and the instrument to conduct it must be developed.

A lot has been said and written about measurements. In correct use of the language, measurement refers to material things; therefore, in order to unify an acceptable nomenclature for the training area, the term evaluation is proposed.

EVALUATION

Evaluation in training is, in a broad sense, the verification of the type, quantity and quality of knowledge and skills a person possesses to perform in a given job, activity or task.

Applied in a course, in a workshop or other concrete training activity, **evaluation is the verification of accomplishment of objectives, through a test or exam, wherein the participant demonstrates having achieved the previously established standard.** (OBJECTIVE 1)

The definition refers to “verification of accomplishment of objectives”; it is obvious then, that the evaluation should match them. Careful attention to this fact requires that the evaluation test be designed immediately after the objectives are drafted.

It would appear that the evaluation is conducted upon conclusion of teaching. That is not the case; in the interactive teaching method, evaluation is part of the entire training process. It occurs before starting the lessons¹, during the lessons and at the end of each one. It culminates with a final test for the course. However, it may extend beyond the learning period, with the evaluation of real performance of the tasks described in the performance objective.

Objectives should be made known to participants during the first encounter with the instructor. This facilitates the participation of all actors in the teaching-learning experience. The instructor knows what topics or issues he should emphasize and where to check progress. Participants know where to focus attention and make sure they have understood correctly.

Evaluation of the object: What do we evaluate? (OBJECTIVES 2 AND 3)

One way to classify evaluations is to consider the object to be evaluated. In training we evaluate knowledge and performance.

Knowledge evaluation: Through an oral or written test, it verifies the participant’s knowledge, that is, it addresses **knowing**.

Tests will be addressed later but, in order to better understand knowledge evaluation, the following examples may help:

- *Explain what risk factors are and their importance in disaster planning, according to what was taught in the course.*
- *Mark in the attached list, the objectives that have action, condition and standard, according to the definitions printed on the first page.*
- *Describe how earthquakes occur, according to the theory of tectonic plates presented in the lesson.*

See Plan Preparation and Presentation, pg. 4; the test is prepared immediately after the objectives have been drafted, in order to guarantee the relation.

See Interactive Training pgs. 4 and 5, Feedback, Interaction and Evaluation.

*The training should be prepared and presented as a function of:
“Will be able to ...”*

¹ See Plan Preparation and Presentation, Key Aspects.

Performance evaluation: Through a test, it verifies the participant's applied knowledge and skill while he/she executes an activity; it addresses **doing**.

For example:

- *Design and prepare two transparencies. Use the equipment and materials provided: two texts, acetate sheets, one photocopier, one overhead projector, two plastic frames and transparent adhesive tape.*

Maximum time for the task: 5 minutes.

Maximum number of acetates to be used: two.

All training is aimed at achieving or improving performance.² In some cases, performance will mean using vast knowledge and in others there will be significant predominance of psychomotor or intellectual skills.

If the performance to be achieved is mainly conceptual, analyzing and defining problems, proposing alternatives for decision-making or interpreting texts, it will mainly require knowledge. It will be important to evaluate knowledge through an oral or written test, based on specific questions and the development of explanations.

If the performance is operational: making perforations with specific equipment, conducting cardio-pulmonary resuscitation, cutting metal with an acetylene torch, fighting a spot fire with a chemical foam extinguisher, will require skills that will be evaluated by the instructor while the participant executes the task (performance) in his presence and under conditions similar to reality.

In addition, other situations require both types of evaluation.

If the performance to be achieved is operating a computer, a person will require basic knowledge for operation and lots of practices for correct results. But if it is preparing a budget, the person will require large amounts of information, and must know how to obtain it, use it and present it.

In these cases, what should you do to get a better idea of a participant's capacity? It is obvious that both cases require knowledge in order to perform. So you conduct a knowledge evaluation.

In the first case, what is a computer, what are the elements it consists of, accessories, basic functions. In the second case, what is and how do you calculate needs, what are overhead and variable costs, describe two funding methods, explain how equipment amortization and currency depreciation affect the budget.

In order to complete the verification of the capacities acquired, a performance evaluation is conducted. For operating the computer, you may require:

*During training, **doing** is what enables determination of whether partial performance has been accomplished (goal) and, at the end, whether the performance objective was achieved.*

Whether intellectual or predominantly psychomotor tasks, both require knowledge and skills.

² See Introduction, page 2.

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Include the information provided in the database using the expanded keyboard.

Find the required texts in the worksheet and change the sequence of the paragraphs using the mouse, as requested by the instructor.

In preparing the budget, performance can be evaluated as follows:

Prepare the budget for hosting a Training for Instructors Course in San Jose, Costa Rica in 4 months. The organizers will pay for travel, lodging and meals.

You have all the necessary information, which you must request from the instructor. Present at least two options. Time for the test is two hours.

Evaluation of the needs: Why do we evaluate? (OBJECTIVE 3)

In a training program or activity, there are several needs that require evaluation. We evaluate because we need the following:

Feedback³

The instructor must know, almost continuously, the progress made by the participants and the weak points of the training. He also needs information about his own performance. He obtains data through verifications, questions to the participants, and evaluating their questions and contributions.

During the presentation, questions may arise that suggest a deficient explanation, distractions, insufficient emphasis on a key point. Other times, examples or participant comments indicate a high level of understanding and assimilation. This helps him confirm what is going right, review what has not been understood by participants, clarify doubts and adjust his presentation.

Because of interaction, feedback occurs in both directions; the participant may evaluate his progress or unsatisfied needs.

Validation⁴

The lesson, unit, course and any other training activity must be evaluated to verify its effectiveness. Validation occurs through what is learned by participants at the end of each lesson and at the conclusion of the course. It can also be conducted by evaluating participants' performance in their real jobs, in relation with the method and the contents of the course or program.

Certification

Some training activities are developed for the purpose of enabling specific tasks. Others provide the knowledge and skills required to opt for a particular job or position. In all of them, the participant needs to receive a certification of the capacity obtained.

To satisfy this need, evaluation should be conducted before, during and, especially, after the training. The evaluation must be based on clear performance objectives with well-defined and applied performance patterns. This is the only way to ensure reliable certification.

³ See Interactive Training, pg. 4 and 5.

⁴ See Plan Preparation and Presentation, pg. 5.

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In the Courses and Workshops of the USAID/OFDALAC Program, the certification means the participant satisfactorily accomplished the objectives (training and performance). In some cases, a certificate is issued only for attendance, participation or having passed the course.

None of these certificates indicate competency, suitability or graduation on the topic discussed. This type of certification is reserved for the institutions legally empowered to grant it and recognized by the competent official entity.

Proficiency/Sufficiency

In this case a person that for any reason has to take a course, requests that it be recognized that he possesses the capacity to be taught in the course. His knowledge and skills will have to be evaluated; if the person can demonstrate having them, it will be considered that the course has been approved.

In the case of institutions that require certain capacities to promote people to higher positions, they offer a special course to personnel and after the training they make the selection and promotion. People who claim to have the required capacity (sufficiency), may request an evaluation; if they demonstrate it, they would not be required to take the course to compete for the position.

Evaluation of the moment: When de we evaluate? (OBJECTIVE 3)

The evaluation action may be considered in relation to the moment of the program in which it occurs. From this point of view, evaluations are conducted at the start, during and at the conclusion of the training.

The time to evaluate will depend on the design of the course, the needs of the evaluator and the situations that occur during the teaching-learning process.

At the beginning of the training

The evaluations conducted before the start of the lessons serve to:

- identify what knowledge or skills the participant has, what areas need to be reinforced and direct the training to those;
- identify whether they possess the basic knowledge required to access the course;
- determine the level of knowledge and skills participants have in order to adjust the training to the group (leveling).
- knowing whether the training is necessary, based on a needs analysis.⁵

In the case of OFDA, to present the Program courses (ITC, PRIMAP, BAGER, etc.), the instructor must participate in the corresponding workshop, be evaluated by OFDA personnel and satisfactorily accomplish the objectives

A well-known example in systematic formal education is to take a test without having taken the course as a regular student

⁵ See Plan Preparation and Presentation, pg. 1.

During the training

It is conducted throughout the training process. Feedback was already discussed: a continuous form of evaluation, fostered by the interaction between the participant and the trainer or evaluator. Evaluation also occurs during specific moments of teaching (goals): at the conclusion of each lesson or each unit, or every two or three lessons, through an exercise or demonstration by the participants.

Evaluating during the training provides close follow-up of the progress achieved by the participants and verifies the effectiveness of the parts that comprise the training process.

Throughout the lessons it is apparent that evaluation is permanent in the Interactive Method.

At the end of the training

It is the most widely used evaluation, allows verifying that a sufficient level of knowledge and skills has been achieved to consider the performance objective has been accomplished. The final evaluation is necessary to certify the capacities acquired. It is also required to validate the entire training process.

Evaluation of the capacities: How do we evaluate?

There are basically three ways to verify the behavior described in the objectives, that is, the capacities acquired: written, oral and psychomotor.

Written evaluation

It is the most commonly used in education and training.

Allows developing different types of tests to evaluate knowledge and some predominantly conceptual performance.

One important reason for preferring written evaluations is the possibility of saving time and personnel.

Oral evaluation

It is another way to evaluate knowledge. Used in special cases for participants who are illiterate, blind, handicapped who are not able to write.

Sometimes it is useful to overcome language barriers. If the person taking the test is not too familiar with the language, the oral test allows clarifying doubts and formulating questions and answers in different ways. It allows use of non-verbal communication.

The topic of tests will be discussed below, but one of the most important reasons for opting for oral evaluations should be mentioned here, subjective tests.

These tests have multiple possible answers. The examiner may need to ask questions according to the explanation of the trainee, to verify whether he complies with the acceptability criteria.

In other cases, a demonstration to explain the location of the components of the equipment or procedure may be necessary. The following examples may help to better understand the needs of subjective tests:

Define administration. In this case, is there a single definition? Is the definition provided by the participant correct? If it is not the same presented in the lesson, is it incorrect? Incomplete? To what theoretical approach does it belong?

Explain the preparation and use of flip charts, including “tricks”. It is evident that a demonstration during an oral evaluation will enable better appreciation of the trainee’s competency.

Psychomotor evaluation

It evaluates the execution of an activity. Widely used to evaluate operational proficiency with instruments, tools and machines.

These evaluations must follow guidelines. The evaluator uses checklists that indicate:

- sequence of steps to accomplish the task;
- performance criteria (speed, safety);
- quality criteria;
- scoring criteria.

It is commonly used to evaluate the capacities taught in the demonstration and practice mode.

Combined evaluation

In some cases, written and oral or theoretical-practical tests are used for the same evaluation. The trainee may have to answer some basic questions in writing to have access to a more detailed oral evaluation. Or, he may be asked to state the theoretical knowledge orally or in writing, to be allowed to demonstrate it in practice.

TEST OR EXAM

So far we have discussed evaluation: what, why, when and how we evaluate. In other words, verification of having accomplished what was desired. Evaluation is a very important part of training and therefore it is indispensable to completely master the instrument required: the Test or Exam.

The test is the instrument or tool used to evaluate skills and knowledge.

All tests or exams must meet some requirements, such as:

- being in agreement with the objectives;
- being reachable with the skills and knowledge taught in the lesson, unit or course;
- covering all contents to be explored and focusing exclusively on those contents;
- being easy to apply and correct; formulate concise, clear and representative questions that diminish subjectivity to the minimum extent possible; and
- being valid and reliable.

When preparing the test, take into account that this is a training environment, not one of torture or repression.

Types of tests (OBJECTIVE 4)

When we addressed evaluation according to the manner in which capacities are shown, written, oral and psychomotor were mentioned.

It was said that written tests were the most widely used and allow different types of testing, of which the most common are the following:

Objective tests

They are written. They are called objective because they can be evaluated by different people with identical results. Verification of the answers can be done by a machine, as they are easily programmed and computerized.

Since they don't require interpretation or use different approaches or biases, these rarely cause controversy.

The most common objective tests are:

Multiple choice: consists of a statement that is either an affirmation or a question, followed by 4 or 5 possible answers, where only one is correct.

The other options, called distractions, must be convincing, because if not, they will reveal the correct answer.

Example: *in a classroom where transparencies are projected, the distance between the screen and the first row of participants may be:*

- a) *no more than twice the distance between the overhead projector and the screen.*
- b) *one and a half times the distance between the first row and the overhead projector.*
- c) *one fourth of the distance between the first and last row of participants.*
- d) *no less than twice the width of the screen.*

Preparation of these tests faces the difficulty of finding distractions that are not too absurd and resemble the correct answer.

Sometimes, inadvertently, clues that suggest the right response slip into the statement.

Example:

A hazard is an important factor to be considered in mitigation. A hazard is:

- a) *a probability of damage*
- b) *an external risk factor*
- c) *the probable risk*
- d) *the potential for disaster*

Observe the statement; the word *factor* is the clue, present in answer b).

Multiple choice allows evaluation of knowledge in almost all subjects and specialties. It is one of the preferred tests in the field of evaluation.

True/False: consists of a statement that the participant has to determine as being true or false.

Examples:

- *In evaluation, all reliable tests are valid. **T**___ **F**___ (mark with an X, as appropriate)*
- *Indicate whether the following statement is true or false by writing "T" or "F" in the blank space:*

___ *An organizational chart is a graphic summary of the formal structure of an institution.*

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True/False tests should only be used for knowledge objectives. They are easy to prepare and correct.

The disadvantage is that since there are only two options (T or F), the trainee has a 50% probability of guessing the answer.

Some people propose explaining why it is T or F, but this changes the essence of the test that ceases to be True/False.

Fill-in the blank: is presented in the context of an incomplete statement, for the participant to complete.

Example:

- *An intervention to implement measures and execute risk reduction actions is called _____.*
- *Verification of participant progress, in a training course, is conducted through _____.*

The statement should not provide any grammatical clue. The use of specific adverbs and adjectives may induce participants to answer based on grammar.

This type of tests are easy to prepare and correct.

Placing the blank space at the end reduces the likelihood of confusion, since the training has to supply the answer once he knows the context.

Matching: these tests have three parts: instructions, problems and options. These tests are similar to multiple choice: difficult to prepare but easy to evaluate.

Example:

Find the match between the terms in both columns; write the letter from the option in Column 2 that matches the problem, in the blank space in Column 1.

<u>Column 1</u> (problem)	<u>Column 2</u> (options)
<i>Purpose</i>	<i>a) Interactive teaching</i>
<i>Objective</i>	<i>b) Validity</i>
<i>Method</i>	<i>c) Gestures</i>
<i>Test</i>	<i>d) Specific</i>
	<i>e) Intent</i>
	<i>f) Reference</i>

In matching tests, problems must have relations that make the options reasonable. The distractions should not confound but neither should they be too absurd.

The options column has two additional possibilities that constitute the distractions.

Subjective Tests

Subjective tests are easier to prepare. Great care should be exercised in drafting clear questions and in their organization.

In this type of tests, the trainee is at the mercy of the interpretations and approaches of the evaluator.

The most complex part is the evaluation process. It takes a long time and has the problem that it is very difficult to have a detailed response key to unify the scoring criteria.

Written subjective tests are mainly essays and short answer questions.

Essay: consists of expanding on a topic, assigned by the evaluator, with the length and depth specified in the objectives. It may be several paragraphs or pages long. It is used to evaluate the breadth of participants' knowledge in a specific field.

Example:

Explain the decision-making process:

- *describing each step;*
- *detailing the influence of uncontrollable variables; and*
- *demonstrating the importance of considering the post-decision environment.*

Short answers: questions or statements that require a brief explanation. In this case, it is less complicated to have a reference to unify evaluation criteria.

Example:

- *Explain what a proficiency or sufficiency test accomplishes.*

Although these are low cost tests, the evaluation has to be conducted by people who are specialists in the topic

Performance tests

Among the performance tests, the most commonly used are:

Simulation: presents participants with a situation that imitates reality with problems that must be solved.

The best know example is a flight simulator, which tests the aptitude and skills of an airplane pilot candidate.

Another example: a Head of Operations of Civil Defense who has completed his training in organization, is *“assigned to the Central Region of the Republic of Mirolia”*. He is provided the necessary data, which includes the history of disasters that have occurred and he is charged with developing the organizational structure of a Civil Defense Regional Office for the area, in accordance with the guidelines provided in the course and within a specified period of time.

Drill: a real action is simulated in the same place where it could occur, with the people, materials and equipment habitually available for these cases. The participant must meet the performance required in the test.

Example: training for rescuing victims in confined spaces has been completed. A drill is developed for a *collapsed building where five people (actors) that are trapped in the basement must be rescued. The tools and equipment that are usually used are available and the order is given, to those that will be evaluated, to proceed with the rescue.*

Demonstration

Test, usually for psychomotor evaluation, conducted in the classroom, where participants must execute a task to demonstrate having achieved the capacity described in the objective.

Real performance

Evaluation during the participant's performance in his/her workplace. It is also known as in-service evaluation.

Validity and Reliability (OBJECTIVE 5)

These are practically a synthesis of all other qualities of the test, and therefore should be considered carefully.

It is important to understand that validity and reliability refer to the results. Once the test is designed, the results of that test should be observed after applying it several times in a similar environment, to the same group or to parallel groups (who have received the same training).

In other words, the validity and reliability of a test depends on obtaining valid and reliable results after applying it several times under similar conditions.

Validity

A test is valid when it evaluates what it should evaluate. The results of the test must show it evaluates the specific capacities defined in the objectives.

A test is valid when it evaluates the objectives, that is, as long as it is valid it is also reliable.

Reliability

A test is reliable when it repeatedly evaluates the same. The agreement of results, whether related to the objectives or not, in successive applications of the test, is what expresses its reliability. This quality differs from validity in that it is possible for the test to evaluate well, although it may not evaluate what it is intended to evaluate.

A test that is not reliable (evaluates different aspects each time) is not valid either.

Exercise on the relation between validity and reliability

The same test does not always have both qualities. Below are three forms of test to evaluate an objective.

Make the effort to distinguish valid tests from those that are not and do the same for reliability. In the spaces provided, indicate yes or no and why.

- Two lessons have been presented in a course, which form a unit, with the following objective:

Upon completion of the unit, participants will be able to demonstrate he can communicate with the group in the classroom.

At the time of evaluation, three tests are proposed, already used other times, and the instructors must decide on one of them to evaluate the participants.

Test 1: *Select a training topic to be presented to a group of twelve participants. You must demonstrate your capacity to communicate with*

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the group. You have available the facilities, materials and equipment necessary.

The time assigned is 30 minutes.

The test was conducted eight times. In all cases, the participants made their presentations using techniques and media to achieve communications with the group and feedback to verify the effectiveness of that communication.

Validity _____

Why? _____

Reliability _____

Why? _____

Test 2: Explain, orally, how you achieve communication with the group in a classroom.

The test was conducted six times. In all cases, the responses referred to education communication techniques.

Validity _____

Why? _____

Reliability _____

Why? _____

Test 3: This unit will evaluate participant's training while he presents the topic "Visuals aids in training" to a group of twelve students.

You have: a lesson plan, reference material, aids, facilities and equipment.

Time for presentation: 45 minutes.

The test was conducted seven times. During the review of the results, it was noticed participants focused their presentations as follows: in two cases, on the usefulness of aids in training; one on images and non-verbal communication; one on visual aids as a guide for the instructor; one on the importance of interaction between participants for communication; one on training in communication and one on barriers to communication.

In no case did the trainee's presentation focus on demonstrating communication with the group and verify its effectiveness.

Validity _____

Why? _____

Reliability _____

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Why? _____

The results of a test must be reliable in order to be valid; but the fact they are reliable does not guarantee validity.

Once the tests and the results of the applications on different occasions are known, you are in a position to select a valid and reliable test.

Which of the three would you select?

Go back to the objective and review again the simple tests. Are you sure of your answers? It may good to review the concepts of validity and reliability.

In any case, don't despair; on this page you will find the correct answers and some additional comments.

Answers and comments on the validity and reliability exercise.

Test 1

Validity: YES; the results indicate the test evaluates communication capacity.

Reliability: YES; each time it is applied, the test evaluates communication capacity.

Comment: The test is in agreement with the training objective, the instructions are clear and complete, the participant knows the evaluation criteria.

Test 2:

Validity: NO. It evaluated knowledge of education communication techniques but not the communication capacity of the participant with the group in the classroom.

Reliability: YES; in all cases the answers referred to the same topic, education communication techniques.

Comment: In this test there is no agreement with the objective which is to "communicate" and not to "explain how it is done". The instructions are clear, that is why the answers reveal that the test evaluated the same thing each time it was applied.

Test 3:

Validity: NO. It does not evaluate what is should evaluate, communication capacity, but rather different knowledge about visual aids, training and communication.

Reliability: NO. Applied several times, the results indicate it evaluated different knowledge.

Comment: The statement of this test confounds the participant; does not clearly show agreement with the objective. In addition, a topic is imposed, which may lead some to think mastery of these contents will be evaluated. The participant is told that his training will be evaluated, but

there is no certainty in what; the participant therefore “interprets” that his capacity for innovation, his knowledge of communication based on images or anything else is to be evaluated.

Detecting faults in tests before applying them

It is advisable to carefully examine the tests, as sometimes faults may be found.

The statement must be reviewed by comparing it with what is specified in the objectives to verify if there is agreement.

Example:

Objective: the participant will be able to list the steps to be followed to start the electric generator.

The steps must be in the correct sequence.

Test: *Assign the correct sequence to the steps to start the electric generator:*

_____ *Activate on pre-heating key*

_____ *Check the level of motor oil*

_____ *Press the on button*

_____ *Open the fuel valve*

_____ *Verify level of fuel*

It is advisable that the person developing the test has it reviewed by someone else that is familiar with the topic.

In this case, the test is not in agreement with what is specified in the objective. Why?

Because the objective specifies that the participant will be able to list the steps, that is, he will learn them; to answer this test, as formulated, he doesn't have to know the steps.

Dear reader, you will probably have taken the time to risk answers to the simple tests

You will surely appreciate finding those answers here

d) no less than twice the width of the screen.

-In evaluation, all reliable tests are valid. **(F)**

An organizational chart is a graphic summary of the formal structure of an institution. **(T)**

Pg. 9

- An intervention to implement measures and execute risk reduction actions is called *mitigation*

- Verification of participant progress, in a training course, is conducted through *evaluation*.

The correct matching sequence in column A is: *e; d; a; b*.

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- Explain what a proficiency or sufficiency test accomplishes.

The proficiency test serves to verify that the candidate for a higher level of training or up for job promotion, has the knowledge required for it.

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*Knowledge and skills developed for adults
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Pre-Work

Version 2010

QUESTIONNAIRE

NAME

1. How do you define Lesson Plan?

2. What are the *components* of a learning situation?

3. What is the lecture method?

4. What is the function of an instructor?

5. What are the *elements* of the Interactive Teaching Method?

6. What is feedback?

7. How do you define communication?

8. What is public speaking?

9. When is a test valid?

10. What are the *characteristics* an objective must have?

11. What does the term validation refer to?

12. What is a performance objective?

13. What is a visual aid?

14. How do you explain the criterion of *correlation* or *correlativity*?

15. List important characteristics of voice during a presentation?

16. Why is a U-shape arrangement useful?

17. What are the *components* of an objective?

18. What are the rules for a good flip chart?

19. How do you define training?

20. In the interactive method, when is a *training objective* accomplished?
