

***T*** *RAINING*  
***F*** *OR*  
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**Reference Material**





# Training 101 Notes

## Unit 3

Ten Powerful Opening Strategies  
Six Motivational Principles

From *Training 101* edited by Catherine M. Petrini.  
Training and Development Journal-June 1991  
American Society for Training and Development  
1640 King Street, Box 1443  
Alexandria, VA 22313-2043



## Ten Powerful Opening Strategies

**By Dorothy Leeds**, *president of Organizational Technologies Inc., 800 West End Avenue, New York, NY 10025.*

*Hello. My name is Dorothy Leeds and I'm here today to give you some lessons on improving your sales techniques through body language. Now, the first thing I want to talk about is....*

If you begin your training programme the way I've started this article, you'll have a hard time conducting a successful session. You'll have lost your trainees' attention before you've even started.

### **Powerful trainers start powerfully**

You must gain your participants' attention and interest immediately. Without that attention, you won't get your message across, you'll have trouble sustaining whatever interest there is, and you won't have established your leadership and control – the keys to being a successful trainer.

As a trainer, you're an unknown quantity – for the first 30 seconds. That's about how long you have to make your First Impression. After that, everything you say and do will be coloured by that impression, so it's important that it be upbeat and make an impact.

Even if you're an in-house instructor and the participants already know you, your opening must let them know that this training session is going to be lively, interesting, and informative.

### **Be creative from the start**

When participants attend a workshop, they may be nervous about having to learn something new. Or they may be resistant, and resent that they've been sent for training – they may feel that someone thinks their old ways aren't good enough. It's your job to set up an atmosphere that is both "user-friendly" and stimulating.

Say you're doing a programme on body language. You might come into the room purposefully, and then stop and stare at the group for a few seconds. Turn abruptly to the blackboard and pick up the chalk. Without saying a word, print "Take out a pen and paper and write down everything you know about me already."

That kind of opening serves several purposes:

- it establishes your authority
- it sets up the participative nature of the programme
- it's fun for you and the trainees.

### **Ten strategies**

Openings have more crucial responsibilities than almost any other part of your training. They're not only for gaining attention; openings contain many subtle nuances. One well-crafted opening can combine many tasks into just a few minutes.

What follows is a list of ten strategies that make for a powerful opening.

#### **1. Get trainees' attention**

How you get it is not nearly as important as making sure you do get it.

For example, if you're conducting a computer training session, you could have a problem set up and waiting for participants. As soon as they enter, announce that you're having a contest and the first person to solve the problem wins a prize. Use your imagination to create a lively learning atmosphere.

#### **2. Build a bridge between**

what went on before and what is to come. For example, if you're opening the second session of a sales training programme, refer back to the previous day's training by asking participants which techniques they found most helpful. Then you can go on to say that by the end of this session, they'll add on to their successes.

Or you can link your training to a current event. A time-manage-



ment seminar could begin with a discussion of how the morning's traffic jam affected the day's plans.

**3. Let them know your purpose and objectives.** Tell them exactly why you're there. Instead of saying, "I'm here today to teach you about safety in the workplace," say, "I'm here today to give you ten simple, specific methods of ensuring your safety in a hazardous work area." Let participants know what you expect to accomplish by the time the session is over.

#### **4. Get them Involved**

Ask questions. For example, you could do a short audience survey: "How many of you are here because you want to be? How many are here because you have to be? How many wouldn't answer no matter what I asked?"

Have participants move around if possible. Try to make the experience an active one, rather than a passive one.

**5. Build realistic expectations** for what is to follow. For example, avoid starting with a great joke and then going into a list of facts and figures; your participants will feel that they've been let down.

If you're sitting at a paper-strewn desk, are missing half your handouts, and can't find the chalk, participants will expect your training session to be scattered and disorganized. If

dirty ashtrays are spread around, there aren't enough chairs or tables, and you come in five minutes late, participants will get the message that you're not in control.

But if you're there to greet them with a warm, friendly smile, a properly arranged room, and an exciting opening, expectations will be positive and high.

#### **6. Warm up your audience**

Relax the participants and show them they will have a good time in this training session. Let them know that you won't bore them. You're not putting them to sleep; you're saying, "It's OK, you're in good hands."

#### **7. What's in It for them?**

Give the trainees confidence in you by showing them how they will profit from and enjoy this training session.

Get participants to sell themselves on the training benefits. Ask, "What's in it for you to become a better speaker?" or "How will it help you to learn new computer techniques?"

#### **8. Let them know you're In control.**

Give any necessary directions, such as how and when you'll deal with questions or handouts. Explain everything up front.

Make sure the room is set up in the way that's best for your programme. You don't want anyone sitting with her or his back to

you, or too far away to see the chalkboard or the visuals.

#### **9. Reveal yourself**

Let the participants in on something about you personally.

You'll gain their support by showing that you are human and fallible – and that you weren't always the expert you are today. Let them know how you've benefitted from training.

I often tell the story of the day after I attended my first assertiveness training class. I was on a tight schedule. When my plane made a stop in Atlanta, a flight attendant came over and told me there was a problem with my ticket, and that I'd have to take a later flight. I kept smiling and repeating, "That may be true, but I'm not getting off this plane." I flew on to New York as planned.

**10. Let them know you're glad to be there.** This can be evident from your own enthusiasm; you can also address a compliment directly to the trainees or disclose something about yourself in a way that shows you are relaxed around them. Smile, welcome them warmly, and begin!



## Six Motivational Principles

Understanding how people learn is an integral part of planning and writing a lesson plan. What motivates adults to learn?

Six basic motivational principles apply within the context of planning and writing a lesson: relevance, conceptual framework, learning outcome, method, evaluation, and primacy or recency.

### **Relevance**

This principle addresses the relevance of the lesson for the trainees. It is usually covered in the “gain attention” part of the lesson plan and tells trainees what benefit they will derive from the lesson. We call this WIIFM (What’s In It For Me?).

If an instructor cannot describe the lesson’s benefits for the class, then instructor and trainees might as well not bother with the lesson – it’s a waste of everyone’s time.

### **Conceptual framework**

A conceptual framework is basically the main ideas and secondary ideas of the lesson, outlined for the audience. The conceptual framework provides two important things.

First, it tells trainees where they are going during the lesson. That helps to decrease their natural anxiety about a lesson.

Second, the framework creates gaps in a trainee’s mind that must be filled. When the instructor tells a trainee that he or she will talk about three things and then names those three things, he or she creates gaps, which can be powerful learning tools. If the instructor does not talk about those three things as promised, the gaps are left unfilled and the trainees are left unsatisfied.

By filling the gaps, the instructor provides closure in the trainees’ minds. Closure is such a powerful concept that if I tell you I am going to tell you a joke and then say, “knock, knock,” you will probably automatically say, “Who’s there?,” if not aloud, then to yourself. Closure is a subconscious force that the instructor can use as an ally in the strategy for learning.

### **Learning outcome**

The learning outcome tells trainees what they must be able to do at the end of the lesson, under what conditions, and how well.

An instructor who cannot express a learning outcome to the class might as well not bother teaching the lesson. Knowing the expected learning outcome reduces trainees’ anxiety.

### **Method**

The method tells trainees how they will learn. It should cover all the methods that will be used in a particular class, such as lectures and demonstrations.

### **Evaluation**

Think of all the times that you have been a student. Chances are, one of the most important things you wanted to know was how you were going to be tested.

When describing the evaluation of trainees’ learning, you should cover the method of evaluation and when it will occur. This also tends to decrease trainees’ anxiety.

### **Primacy or recency**

Research shows that people tend to remember best the first and last things they see or hear.

This is an important concept for an instructor or course developer to understand. Keep it in mind when you determine the sequence of teaching points and when you plan for reinforcement of what was taught in the middle of a lesson or within a main idea.



# Unit 4

## Secrets that we have kept from our students

or

Pssst! What do you know about this instructor?

Written by  
William A. Deterline, Training Consultant  
*EDUCATIONAL TECHNOLOGY* Magazine, 15 February 1968

Updated by  
Jerry L. Williams, Training Consultant,  
Office of U.S. Foreign Disaster Assistance  
Training For Instructors Course, 1992



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## SECRETS THAT WE HAVE KEPT FROM OUR STUDENTS

Teachers and instructors spend most of their time presenting information to students – as much information as possible, in as many ways as possible.

Students listen to lectures, watch demonstrations, work in laboratories, read textbooks, consult supplementary references, look at illustrations, sit through audiovisual presentation, take part in discussions with teachers and fellow students, and confer privately with teachers. Unfortunately, they are all too often overwhelmed by the bounty heaped upon them.

They carry out activities called studying, reviewing, note-taking, and outlining – all as part of an attempt to process a mass of information and “learn it”. By “learn it” we mean that their behavioural repertoires are to change so that they can then produce equivalent forms of the information, apply it, explain it, make decisions on the basis of it, solve problems, or do something that indicates that the content of the course has been assimilated.

Supposedly, the participant's task is to learn the course content. In reality, it is not intended that he/she learn all of it. For example, it is not difficult to imagine a dialogue like this taking place between a student and teacher:

*Scene: A classroom. The teacher has just given the students their graded essay examination papers, and a student has asked why one of his answers received zero credit.*

*Teacher: Because I asked you to explain the general principle, and you only discussed a specific example.*

*Student: But you taught us all about that example.*

*Teacher: Yes, and we discussed many other examples, but only to make the principle easier to understand. That's what you were really supposed to learn – the principle. Don't you remember our going over the principle several times?*

*Student: Vaguely, but I remember the examples better. We spent more time on them and they were easier to understand.*

The teacher and the student have become ensnared in an almost universal educational problem. And here is another dialogue that illustrates the same problem in another form.

*Student: I don't think this question is fair.*

*Teacher: Why not?*

*Student: Because it is about something that doesn't seem to be very important. You spent only a short time on it, and the book covers it in only half a page. I concentrated on this other topic because it seems to me to be so much more important. You spent three class periods on it, and it fills almost eight pages in the book, but you only asked two questions about it. What should I do before the next test in order to study the right things?*

What can the teacher say? Study everything?

These examples are only two possible manifestations of a problem encountered by all students and all teachers – and we can probably add, a problem encountered all of the time. Students cannot discriminate the exact composition and form of the behaviour that makes up the instructional objectives of most courses. They cannot discriminate because no one tells them exactly what they should be able to do at the end of instruction. They are not told the objectives of a 50-minute class period, a homework assignment, or a complete course. We inundate them with information of all kinds and in all forms, but we do not tell them what to do with it or exactly what performance is expected of them. How is a student to discriminate, select, and attend appropriately? It's an impossible task.

Consequently, a student is left with the chilling prospect of either trying to learn everything or



concentrating on a manageable portion – hopefully the correct portion – and ignoring the rest. If he/she tries to learn everything, there is a better than even chance that he/she will know a little bit about everything, but not enough about anything. In trying to “pick his spots”, the risk of choosing the irrelevant portions for his study in depth is very real.

We don’t or shouldn’t want the student to fail – we should provide everything needed to succeed.

### PROVIDING GUIDELINES

If we neglect to provide the necessary guidelines prior to starting the course of instruction, we could still salvage something by providing that guidance after presenting the information but before testing the participants' learning.

When anxious students press for information about a forthcoming examination, we generally refuse to provide specific answers to specific questions. We guard our tests with an enthusiasm and vigor that would impress the CIA. We make examinations a dandy surprise and a traumatic experience.

Students, at least by the time they get to college, learn something about the game called “Try to figure out the teachers test building strategies.” The first examination given by a teacher usually furnishes information to the students that should have been given long before the examination period, on the day that they first encountered the material later covered by the examination.

In addition to outraged indignation by students who do not play the strategy guessing game very well, another frequent response to the first examination, usually by students who have become fairly skillful players, is “So this is the way the cagey old rascal plays the game.” This is how we compound our first error: we heap secrets upon secrets. Ten teachers presenting the same course content would

probably construct ten different types of tests. The first likes essay questions. The second is a true-false devotee. The third formulates questions requiring concrete, factual answers. The fourth expects extrapolation from practical example to abstract concept. And on it goes.

All of these test items are valid, and every teacher probably makes use of all of them. That, however, is not the point. Admitted or not, almost every teacher has a preference for a particular type of question, and his/her tests will usually contain more items of that type. This, of course, is only a temporary secret since the first test gives it away. While it lasts, however, it adds to the general confusion created by the Big Game.

### GROUND RULES NEEDED

Students have enough problems without having to try to learn to play games without ground rules but with penalties that always go against the same team. Bill Cosby, the comedian, did a skit about football referees and their explanations of the pre-game toss of the coin that determines who kicks off and who defends which goal. He extrapolates to several other conflict settings and describes the referees telling Washington he had called the toss of the coin correctly: “Alright, the colonists won the toss so they can wear whatever they like and hide behind trees. You British have to wear red coats and march in straight lines.” Students preparing for test have apparently also lost the toss of the coin.

And any father, preparing to assemble a child’s wagon, car, or more complex unassembled toy, with all of the poles and tubes and boards and chains and hooks and nuts and bolts and washers in vast and awesome confusion on the floor at his feet, can readily identify with the student, particularly when he finds that the assembly directions are missing.



## DOWN WITH GUESSING GAMES

Course examinations do not have to be guessing games about objectives. Students should not have difficulty discriminating objectives from instructional clarification content, irrelevant content, or enrichment and interest-only content. The game should be designed with better odds for the student, and we should always provide concise directions with every set of parts.

Most teachers do attempt to provide some specific guidance in some form, some of the time, but there should be a better basis for doing it with precision, without fail, all of the time. (“Without fail” was not intended as a pun, but who knows what the consequences might be).

Too many proposed “solutions” or “improvements” in instructional methodology begin: “The teacher should...” We should have objectives for every course and for every instructional event, presentation, or class period.

## WHAT WOULD HAPPEN

What would happen if objectives are given to students? We already have considerable evidence from many sources, including experimental settings, classrooms and training courses, that a new game with good ground rules suddenly appears - one that is more exciting to watch and more fun to play.

If students are told precisely what the objectives are, in the form of descriptions of at least minimum performance requirements, and are given sample criterion questions, the entire learning task suddenly breaks through the murk of overabundant, disorganized information so that definable goals and directions for student activity are clearly visible.

This does not mean that studying will be any easier or that the subject matter concepts or study materials will be learned without difficulty. It does mean that the studying will be more relevant, time will be more fruitfully spent on appropriate content, and each student will have a basis for discriminating his own progress, obstacles, and any need for assistance.

Teaching benefits and so does learning. Examinations become something quite different and less threatening. A student entering a classroom to take an examination should feel as smug and secure as an individual who has somehow gotten a copy of the examination in advance, but without guilt. We should have no secrets from our students.

## RECOMMENDATIONS

All training courses should include the specific objectives they are designed to achieve. Testing and evaluation must relate directly to the objectives. Students should be provided information about testing, evaluation and exercises. Course announcements and pre-work should “tell all” to prospective students.



# Training 101 Notes

## Unit 5

### Lesson Plans

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## Lesson Plans – Strategies for Learning

**By Michael R. Toney, a captain in the Marines and director of the Marine Corps' Instructor Training Course at Quantico, Virginia.**

A lesson plan is a road map, a guide for trainers to follow when delivering courses. Many trainers and curriculum developers design lessons by habit, not fully understanding why they structure their lessons the way they do.

In the lesson plan, method, media, content, and feedback all come together. When you discuss the plan for conducting a lesson or the process of writing one, what you are really addressing is the strategy for learning.

Why write a lesson plan? Here are six reasons:

- It provides a historical document of what has been taught.
- It serves as a guideline in rehearsing for the lesson.
- It can be used to help a substitute trainer if the primary instructor cannot teach the lesson.
- It serves as a basis for an evaluation of both the instructor and the instruction.
- It is used to record changes made in order to improve instruction.
- It covers all the necessary material in great detail.

### BUILDING BLOCKS

A good lesson plan has four main components: the introduction, the body, the opportunity for questions, and the summary. At least three of them go back a long way.

Many people have said that there are three steps to speaking in front of an audience:

- Tell your listeners what you are going to tell them (the introduction).
- Tell them (the body).
- Tell them what you told them (the summary).

Trainers can add a fourth step:

- Ask them what you told them (the opportunity for questions).

### The introduction: getting started

Five ingredients are necessary for an effective introduction: the “gain attention”, the overview, the learning objectives, the description of methods, and the evaluation.

Not surprisingly, the gain attention should be written so that it will actually gain the trainees' attention. It also serves to establish rapport.

All too often, speakers start off with jokes that do not relate to the lessons at hand. Even if such jokes are funny, it takes

valuable time to get trainees back on track afterward.

That doesn't mean that you should never use jokes to gain attention. Just be aware of the implications if your class finds them unamusing or if they do not relate to the lesson you are teaching.

The most important thing you do in the gain attention is to describe the benefits trainees will derive from paying attention to your lesson. Answer the trainees' question: “What's in it for me?” By doing this, you not only motivate your class, but you also ensure that your gain attention relates to your lesson subject.

The overview should give the purpose and conceptual framework of the lesson. The conceptual framework is no more than the main ideas you will be covering in the lesson, numbered and listed by name. If the lesson relates to other instruction, then be sure to let the class know how it relates.

You must make trainees aware of the learning objectives for your course. Introducing the objectives reduces trainees' anxiety by taking advantage of the principle of learning outcome (see the box on motivational principles).

Don't read the learning objectives to the class. That is insulting and can create a barrier



between instructor and trainees. A good method is to have the trainees read the objectives themselves and then to ask them if they have any questions.

Describing your methods means telling trainees the various instructional methods you will use to get the learning objectives across. You may also cover such administrative details as instructional rating forms and the various kinds of media you will be using during the lesson.

The last ingredient of the introduction is an explanation of how and when trainees will be tested or evaluated on what they have learned.

### **The body: filling the gaps**

The body is where you lay out the material of the lesson. It is where you provide closure to the gaps you created in the introduction's overview (the conceptual framework).

The body's main ideas should be in the same sequence as the learning objectives for the lesson or they should be arranged in some other sequence that makes sense (for example, from simple to complex, or from part to whole).

Try to keep the number of main ideas in the body of your lesson to seven or fewer. The

average person tends to remember things in small groupings, with three as the ideal number.

The body should be a detailed script of what you are saying and demonstrating to the class, no matter what methods you will use to get the information across.

The body should never be in a skeletal or outline form. It should be detailed enough so that if the primary instructor could not teach the lesson for whatever reason, a substitute could actually read the lesson plan to the audience.

In general, you shouldn't bring the lesson plan up on the platform with you. Teaching by reading the material straight from the lesson plan detracts considerably from the learning process. It causes the trainer's delivery to take on a canned effect.

But in an emergency – such as when a substitute instructor has had no time to prepare – trainees might get enough out of such a reading so that at least some learning would occur.

### **Question time: probing for understanding.**

During the body of the lesson, it is important to ask questions in order to keep tabs on how well trainees are receiving the lesson material.

If time does not allow for good questioning techniques during the body of the lesson, then you'll need to have a specific part of the lesson, usually near the end, set aside for questions. This allows time for trainees to ask questions, as well as for the instructor to question trainees for that all-important feedback.

The opportunity for questions addresses two ideas:

- where in the lesson the questioning should occur;
- how to camouflage the question opportunities.

If time allows, you should ask for questions throughout the lesson. Effective questioning techniques not only create interaction and generate trainee interest, but also provide the instructor with immediate feedback on the effectiveness of the lesson. Also, you may not want to move on to another idea or teaching point until you are sure the trainees have grasped what you have covered so far.

Try to camouflage your opportunity for questions. Too often, an instructor will not ask a single question until she or he arrives at the end of the body of the lesson. Most of us have been students long enough to know that when the instructor asks us if anyone has any questions, then the lesson is about to end. Once trainees receive that cue, they begin to



tune out the instructor and think about their next break, lunch, or plans for the rest of the day.

If you have used probing techniques properly throughout, you won't need to ask questions again at the end. Are you uncertain about whether trainees understand? Probe by using the questions you've written down in the opportunity for questions part of your lesson plan. Just be sure not to hint to the class that you have arrived at the end of the lesson.

### **Summary: telling what you told them**

Your summary should restate the main ideas of the lesson. Do not present any new material in the summary; don't even re-teach any material.

Like the opportunity for questions, the summary should be camouflaged to keep trainees' attention from lagging. If you start with such phrases as "in summary" or "in closing," trainees will take the cue. They will begin gathering up materials, shuffling furniture around, and generally doing just about anything except paying attention to the instructor.

## **THE GLUE THAT BINDS**

The four main components of a lesson plan would be nothing without the following elements. These elements provide the glue that binds the lesson plan together: time cues, media cues, practice and provide-help paragraphs, instructor's notes, and transitions.

**Time cues** should be approximations of the time it takes to cover each component in the lesson. Within the body, each main idea should have a time cue; those time cues add up to the total time allotted for the body of the lesson.

Time cues help the trainer prepare for the delivery of the lesson in an allotted time. Be aware of the time cues for each component and main idea so you can adjust for interruptions such as questions or group discussions.

**Media cues** should be placed wherever media or training aids are actually used in the text of a lesson. Make a media cue stand out in the lesson plan by highlighting it with underlining, capitalization, color, or other visual prompts. Indicate not only when to turn on or use a medium or aid, but also when to remove it from the trainees' perception.

**Practice or provide-help** paragraphs should appear wherever they are needed in the lesson. A practice paragraph describes in detail the participant activities in a practical application of the subject matter. A provide-help paragraph describes in detail the instructor's role during the application.

**Instructor's notes** should appear anywhere in the text of the lesson plan, as needed. They are nothing more than notes to yourself – reminders, examples, or specific questions to ask trainees.

The instructor's notes can be particularly important to a substitute instructor, since they will help in preparing for a lesson. Like media cues, they should be highlighted in some way to call immediate attention to them.

**Transitions** are without a doubt the most important of the five elements. A trainer uses a transition to summarize the last idea and to introduce the next idea.

The main requirements of a transition can be taken care of by restating the framework of the last main idea and stating the framework of the next main idea to be taught. This effectively summarizes what you



just talked about and introduces what you will talk about next. It also ties together the logical sequence of the main ideas and teaching points in the lesson.

Your transitions can make use of the primacy or recency principle (see the page on motivational principles). Plug a question into the transition that probes for feedback or reinforces something taught in the middle of the last main idea.

A transition should be smooth – but not so smooth that trainees do not know that it is a transition. You want them to know that you are finished with one part and are now moving on to another.

If done properly, the transitions in a lesson serve to camouflage the opportunity for questions and the summary. Transitions should be used between the introduction and the body as well as between the last main idea in the body and the opportunity for questions. Transitions are also used within the body – between each main idea and, if necessary, between secondary ideas.



# **Unit 6**

# **Communicative Visuals**

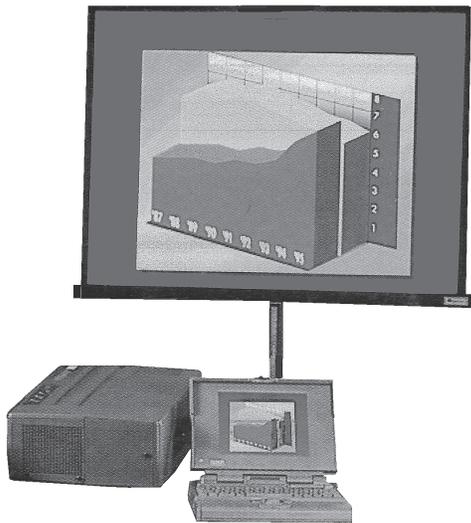
## **Computer-Based Presentations**

Jerry L. Williams, Training Advisor  
Office of U.S. Foreign Disaster Assistance

Dee Williams, Multimedia Center Manager  
National Advanced Resource Technology Center



## COMPUTER BASED PRESENTATIONS



### Use to:

- Show the "real thing" including motion.
- Show many images in a short time.

### Advantages

- Can be used with large groups.
- Easy to store and reuse.
- Easy to revise and update.

### Disadvantages

- Room must be darkened.
- Requires hi-tech equipment.
- Requires software knowledge.

### Format

- Format your presentations for 640 x 480. Many computers and video projectors can not work with a greater image size.
- Check to see how many colours the presentation computer can output to video. Some computers can only output 256 colours. This will affect how you create your backgrounds. If your computer is only capable of projecting in 256 colours and you select a graduated background fill your fill will be banded. It might look great on your monitor screen, however the bands will be much more visible enlarged. The most effective blend of colours projected is in thousands to millions (best). Think about how the image will look projected on a screen.

### Text

- Fonts (the way text looks) are available in a great variety and it is tempting to use more than is necessary. We suggest selecting two basic fonts and then use variations of them. Use one for headers, and the second for the body text. We recommend Helvetica or Arial for headers and Times or Bookman for body text.
- Use upper and lower case for body text. All upper case is difficult to read.
- For emphasis select bold or italic, colour, shadow, and size variation. The use of complex style fonts will reduce readability of your visual.
- Underlining of words does not work well in presentation frames. The underlining blurs out the word or makes descending letters not clear. Think about using bold text or contrast colour text for emphasis in place of underlining.
- Font point size should be large enough to be visible for approximately 60feet/20 metres.
- We use 40, 48 to 60 points for simple headers with few words, no smaller than 30 points for double or triple line text.
- For body text 36 point is average, 30 point may be too small to be read if there is a lot of text. If necessary split the frame into a "continued frame".
- A good guide is no more than 8 lines of text to a frame.. Less for large type.

*A Little Test - Create your text frame, output it to your printer, and tape the page on the wall. If it can be read from 8 feet/2.5metres away, it will be readable when projected.*



## COMPUTER BASED PRESENTATIONS

### Colour

This single element can get a presentation into trouble more than any other single element in design. There should be a good contrast between the background and the text or graphics. If you are using a picture, watch for split areas of light and dark. For example sky and dark ground areas. This presents a problem for arranging text. Take a look at your entire storyboard, and see how the most complicated frame will fit. If you are using solid colour background, most of these problems will not exist for you. The background colour of grey is one of the most difficult colours to contrast with.

- Bright red is difficult for the eye to read.
- Use bright red colour for emphasis only, avoiding blocks of red text. The deeper shades of wine or brick are better. In general, avoid the use of red for anything other than bullets.
- 10% of your audience will have some degree of colour perception impairment. The following combinations should be avoided.
  - Red on blue and vice versa
  - Red on brown and vice versa
  - Red on green and vice versa
- The same problems will or can occur in the placement of coloured lines. Caution on line colours ...yellow, pink, or light combinations of other colours do not project well when enlarged to fit a screen.

### Use of Line Weights

Line weight decisions become very important in a projected image. The line or combinations of lines, direction arrows or sweep arrows need to be heavy enough to be seen well, without overpowering the image. Use at least 1 point or larger.

### Templates available in PowerPoint

“PowerPoint” includes some premade templates for guiding the development of your presentations. However the colour combinations, backgrounds, and the amount of lines and fonts do not always work well. Be creative and design your own, you will find instructions for this process in the software manual. You will find as we do, that this works well, and you will have your favourites that can be used over and over consistently by simply changing colour combinations.

### One last word

These guidelines have been written from experience in the design and development, and most important, the observation of instructors’ presentations in the NARTC classrooms.



# Unit 7 DESIGNING INTERACTIVE INSTRUCTION

A Self-Study Unit





## INTRODUCTION

You can buy insurance for your car, you can buy insurance for your life – but, you can't buy insurance for learning. That type of insurance comes only through design.

Traditionally, instruction has been designed around the instructor's presentation, and the students have been left to learn any way they can.

"Interactive instruction" techniques make it possible to obtain predictable and reliable results in learning. The purpose of this study unit is to describe some design features of interactive instruction which, when applied, insure that learning does occur.

Upon completing this lesson and post-test, you will be able to:

1. Explain what interactive instruction is and what it is designed to accomplish.
2. Briefly describe two design features of interactive instruction.
3. Identify the five (5) essential components of a block of interactive instruction.
4. Describe two ways instruction can be implemented.

To accomplish these objectives, you are asked to read the material and give some thought to the situations presented. You will have met the objectives if you can answer correctly 7 of the 9 questions on the post-test.

## I. WHAT IS "INTERACTIVE INSTRUCTION?"

"Interactive Instruction" is a technique of instructing which results in the participant's achieving predetermined performance requirements. The instruction directs the participant to make periodic responses to the information as it is presented and provides for immediate feedback. It is designed to guide and direct student activities by helping identify, apply, interpret, and make use of critical content – as a tutor would do.

Two principles of learning which reinforce interactive instruction techniques are:

1. The Principle of Participation; and
2. The Principle of Immediate Knowledge of Results.

The "Principle of Participation" states that the learner must actively engage, or participate, in the learning. We know that a person learns by "doing". What does this actually mean? Reading, listening, and watching are types of "doing" but in a *passive* rather than *active* way. The learner must participate *actively* and be forced to think and act by answering questions after each bit of information is presented. The learner must practise those activities which he/she is expected to learn. It has been shown, experimentally, that active participation normally leads to more effective learning.

The "Principle of Immediate Knowledge of Results" is really two principles in one: the "Principle of Knowledge of Results", and the "Principle of Immediacy". By this, we mean that the learner must know whether or not his/her answer to a question is correct and must know immediately. A lapse of even a few seconds after a question is answered and before the accuracy of the answer is known often leads to ineffective learning. Thus, it is essential to design a learning environment in which knowledge of results is provided immediately.



**SITUATION**

As pre-work, the student is asked to read an article on a particular subject. In the classroom, the instructor doesn't comment on the article but presents additional detailed information about the subject.

**QUESTION**

Would this approach be considered interactive instruction? Why or why not?

(Write your response and then read the desired answer on the next page.)

**ANSWER**

We believe you would agree this is not interactive instruction. There are several reasons you may have listed. The student was not:

1. Asked to identify critical content.
2. Guided to make use of the information.
3. Given an opportunity to receive feedback.

**II. HOW IS INTERACTIVE INSTRUCTION DEVELOPED?**

An interactive instruction programme is developed systematically.

First, the instructional objectives must be identified and stated in specific and measurable terms. The next step is to develop the criterion test or final examination for measuring the accomplishment of these objectives. The objectives plus the test are the specifications for the design of the instruction, which is the next step.

The instruction is then designed and constructed. This involves sequencing the learning activities into optimum-size instructional blocks or units, and determining the response mode, type of response, and feedback process.

The final step is to validate (test) the instruction, not the student, to insure that it works and the objectives can be achieved. Revisions may be necessary before the instruction is implemented.

A key consideration is reducing the instruction into small, logical blocks. Each block of instruction should cover only a single task or group of related knowledges. This is a feature of interactive instruction that makes it easy to build interaction into the instruction. The instructional objectives will often dictate the size of the instructional blocks.

**SITUATION**

In a course being developed, there is a block of instruction on placing and receiving telephone calls. One instructional objective is:

Using the technique provided, accurately place and receive a minimum of ten telephone calls.

**QUESTIONS**

1. Explain one way this objective may be measured.
2. Is this block of instruction of optimum size or should it be reduced into smaller units? Explain.

**ANSWERS**

1. Sure, we would have the student actually demonstrate placing and answering calls.
2. This block should be divided into at least two blocks because the skills required for placing calls are different from those for receiving calls. Further breakdown may be necessary depending upon how many different types of calls or telephone systems are used. Obviously more than one objective would be needed.

**III. WHAT ARE THE DESIGN FEATURES OF INTERACTIVE INSTRUCTION?**

Everything done in designing instruction should be for the benefit of the participant. He/she needs to know “where he/she is going, how he/she is to get there, and when he/she has arrived.” This is the insurance that learning will occur. The important design features of interactive instruction are:

1. Reduce the information or tasks to optimum-size instructional blocks. (This was discussed earlier.)
2. Incorporate five components into each block of instruction. They are:
  - a. Instructional Objectives
  - b. Content
  - c. Interaction
  - d. Feedback
  - e. Post Test

“Instructional objectives” are specifications of background knowledge and/or skills that the participant should be accomplished at upon completion of each segment of instruction. They are stated in specific and measurable terms.

“Content” includes subject matter, information, instructions, and directions which guide and direct the participant’s activities, helping him/her to attain the objectives.

“Interaction” is the opportunity given the participant to practise relevant responses and use the relevant information as it is received.

By giving “feedback” the participant is appraised of the accuracy or appropriateness of hi/her responses. They can then evaluate their own progress.

The “post-test” or progress evaluation test, following each block of instruction determines how well the participant attained the objectives. This should not be confused with a final examination which measures attainment of all objectives.

3. Provide participants with some type of “tool” to guide and direct their activities.

Instructors have always utilized some aspects of interactive instruction, mainly in the form of work exercises, case problems, and drills. Rarely has interactive instruction been used effectively in all phases of the learning process, especially in learning background knowledges.

One very effective “tool” is a worksheet or note-taking guide. The worksheet is an outline of questions to be completed during an activity. It is an instrument used to facilitate learning. It directs the participant’s attention to critical areas of information and provides interaction between the participant and the information. The content of the worksheet or any other instrument used during the instruction is dictated by the objectives sought.



The worksheet has four primary values:

- a. It directs the participant's attention to critical information and details what to look for.
- b. It provides relevant practice. The participant is directed to answer specific questions relating to the information presented. Thus, he/she responds to the information in a guided and interactive way.
- c. The worksheet response provides immediate feedback. The participant knows instantly if the response was accurate. If the response was inaccurate, the learner will have the opportunity
- d. The worksheet response allows participants to review the presentation and ensures that their notes of it are correct. They have full access to the critical points of a presentation available for use at any time.

to answer again. The worksheet response allows the participant to evaluate progress. If the learner fails to grasp the meaning or content of part of the presentation, it will be indicated by the responses and so will be able to seek additional help from the instructor or through relevant resource material.

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## SITUATION

The objective of the previous situation was: "Using the techniques provided, accurately place and receive a minimum of ten telephone calls."

The instructor presented and demonstrated the steps of placing and receiving calls. The students were tested and many could not accurately perform the task.

## QUESTIONS

What components were missing from the instruction?  
What could the instructor have done to include them?



**ANSWER**

Obviously, interaction and subsequent feedback are missing.

The instructor should have provided the opportunity for interaction with immediate feedback during the presentation and demonstration of the steps.

**IV. HOW CAN INSTRUCTION BE IMPLEMENTED?**

There is no single model or structure that is universally ideal for implementing designed interactive instruction. Two proven and widely accepted approaches are:

1. Individualized Instruction Approach
2. Integrated Instruction Approach

The “Individualized Instruction Approach” is a self-administered instructional package which can be taken inside or outside the classroom. The package is a combination of interactive instruction and media which acts as a private tutor for one

participant (or group of participants ). It reduces the need for the continual attention from a human instructor. This approach is effective for learning background knowledges and simple tasks.

The “Integrated Instruction Approach” is a combination of individualized instruction and classroom (or group study) instruction. Background knowledge is learned through the individualized instruction approach prior to attending classroom instruction. Classroom instruction provides review, clarification, practice, and application of those knowledges.

A more detailed description of these approaches is given in Appendix A.

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**SITUATION**

Periodically in this study unit, situations were provided in which you were asked to interact with the information. The purpose was to guide and direct your activities toward learning certain background knowledge. The preceding information about implementing instruction is not considered critical to designing interactive instruction. However, the information is critical in the utilization of interactive instruction.

**QUESTION**

How can organizations like yours use this study unit in its training programme?



ANSWER

There are a number of ways. Possibly you identified some of the same ways we did:

1. As individualized self-study for instructors, managers, and others who need to develop more efficiency in their training programmes.
2. As “pre-work” to a course of instruction for new instructors and educators.
3. For re-training purposes.
4. As a demonstration on how interactive instruction can be implemented in printed form.

**V. HOW DOES INTERACTIVE INSTRUCTION AFFECT THE INSTRUCTOR AND THE PARTICIPANT?**

Interactive instruction does not replace the human instructor, but frees the instructor from routine instruction. It allows more time to give individual attention to each student. The instructor serves as a manager, a consultant, and a tutor. This can result in a greater prestige, satisfaction, and personal relationship with the participants.

Interactive instruction tends to give the participant a feeling of personalized instruction. It is tailored to each participant's own needs, and gives a feeling of responsibility and control over the learning process. It also gives a realization that “I know where I am going, how I will get there and when I have arrived.”

For these reasons, interactive instruction can increase student motivation and achievement.

•••••  
• NOW TAKE THE POST-TEST •  
•••••



## POST-TEST

The answers to these questions are given on the next page.

1. Which is more effective for learning?
  - a. Active participation
  - b. Listening, watching, or reading
2. Interactive instruction is:
  - a. Reading preassigned material.
  - b. Making a presentation.
  - c. Using the information as it is presented.
  - d. Viewing a slide-tape programme.
3. Interactive instruction is designed to:
  - a. Guide and direct participants' activities.
  - b. Help determine the instructional objectives.
  - c. Identify training and education needs.
4. A block of instruction is:
  - a. A total course of study.
  - b. The subject matter being developed.
  - c. The smallest logical unit of instruction.
  - d. A lecture.
5. "Insurance" that learning will occur is:
  - a. Designing the instruction to be interactive.
  - b. The participant's knowing "where he is going, how he is to get there, and when he has arrived".
  - c. Validating the instruction.
6. Which of the following include the components of interactive instruction?
  - a. Prepare, present, perform, follow-up.
  - b. Objectives, lesson plan, visual aids.
  - c. Objectives, content, interaction, feedback, test.
7. What is an effective "tool" the participant can use to help interact with the material?
  - a. Slide-tape programme.
  - b. Worksheet
  - c. Outline of the lesson plan.
  - d. Charts and graphs.
8. Which of the following best describe the design features of interactive instruction?
  - a. Structured opportunity for the participant to identify, apply, interpret, and make use of the critical content.
  - b. Developed objectives, a technical accurate presentation, a request for questions, and test the student's knowledge.
9. Which statements are correct?
  - a. Individualized instruction can be used inside or outside the classroom.
  - b. The Integrated Instruction Approach utilizes the classroom for practising background knowledges.
  - c. Designing interaction into individualized instruction and integrated instruction is the key to insure that learning will occur.



## ANSWERS

1. You certainly answered (a), “active participation”. Learning by “doing” is more effective than listening, watching, or reading.
2. (c). “Using the information as it is presented”.
3. (a). “Guide and direct the participant’s activities”. The other two choices are necessary before the instruction is designed.
4. We certainly hope you answered (c), “The smallest logical unit of instruction”. We made a point of this.
5. All of these answers are correct. We did not intend for “insurance” to be a critical point, however, we did stress all of these.
6. We hope you checked answer (c). If you did not remember them, we suggest you re-read section III, “What are the Design Features of Interactive Instruction?”
7. (b). “Worksheet”. Although the other choices are good “tools”, they do not direct the participant to interact with the material.
8. (a). “Structured opportunity for the participant to identify, apply, interpret, and make use of the critical content”. You may have recognized that choice (b) is the more traditional approach to instructing.
9. Obviously, all of the statements are correct. We were pretty sure you would get this one.

**SCORING:** The achievement objective for this study guide was for you to be able to answer 7 of the 9 questions correctly. How did the instruction do?



## APPENDIX A

### EFFECTIVE INSTRUCTION APPROACHES

#### INDIVIDUALIZED INSTRUCTION

A combination of instructional material, methods, and media forming a unit or package of instruction to meet specified objectives. Effective for learning and applying background knowledges and skills. The unit or package acts as a private tutor for an individual (or group of individuals) without the need for the continual attention from a human instructor. Each unit or block of instruction contains specified objectives, guidance instructions, subject matter and relevant material, problems, worksheets, and tests. The participant is guided through the instruction step-by-step, practising relevant responses, given immediate feedback on progress, and must complete successfully each step before proceeding to the next. The instruction is assembled and a management system developed to insure the smooth and effective utilization of the programme. This system includes resources for the participant to obtain help from a subject matter specialist (supervisor or another knowledgeable person) if needed.

The instruction could be self-administered and scheduled in or out of the classroom.

#### INTEGRATED INSTRUCTION APPROACH

A combination and utilization of individualized instruction and classroom (or group study) instruction\* forming a training course package to meet specified objectives. Individualized instruction, prerequisite to classroom instruction, teaches background knowledge\*. It is self-administered. Classroom (or group study) instruction provides review and clarification of background knowledge and practice and application\* of the appropriate knowledge.

(\*Terms defined following.)

Classroom (Or Group Study) Instruction – Bringing trainees who have completed individualized instruction portion of the instruction together under a knowledgeable person (instructor or group leader) for review and clarification and to practise the knowledge learned through the individualized instruction. Classroom instruction is used when practice and application of skills must be given under close supervision, when the skills to be learned require the assistance or interface with another trainee, when developing a team, or when cost, or providing each trainee with the equipment, is unreasonable. Classroom instruction contains specified objectives, guidance instructions, relevant practice problems and exercises and tests, and the trainee is guided through the instruction in the same way as in individualized instruction but under the guidance of another person in a group setting.

Background Knowledge – Theory, concepts, principles, procedures, etc., which a participant must know to be able to practise or perform a job task he/she is expected to learn to do. Prerequisite learning requirements to more advanced learning or skill application.

Skill Application – Practising or applying background knowledge under simulated job-related conditions for learning skills or capabilities to perform a task or tasks (operation, procedure, judgment, etc.).



### **ADVANTAGES OF THESE APPROACHES OVER CONVENTIONAL APPROACHES**

1. Emphasis is placed on the participant's learning rather than on the instructor's teaching.
2. Participants can adapt the study pace to their ability to assimilate the information.
3. Participants are not a "captive audience" to the instructor's convenience, and can use their time most effectively.
4. The participant can select a time period best suited to him/her.
5. The instruction demands attention of the participant. Participants are less likely to be distracted by others or external noises.
6. Participants have more individual attention if they desire it.
7. Scheduling problems are simplified.
8. More participants can be accommodated in less space, with less staff and at less cost.
9. Participants can always review the instruction at any future time.
10. Participant sare given more responsibility and control over their own learning.
11. Each participant is essentially tutored by a subject matter specialist.



# **Unit 7**

# **DESIGNING**

# **INTERACTIVE INSTRUCTION**

A Guide



## Procedural Guide for Developing Instruction

Given

**EMPLOYEE**

**JOB**

**Task** Bring the employee from where he or she is now, to being able to do the job.

- Procedure**
1. Define and list the Job Performance Requirements in specific terms.
  2. Develop a qualification test which will measure the employee's ability to perform each requirement.
  3. Identify the training requirements.  
(Job Performance Requirements – Employee Capabilities = Training Requirements)
  4. Break the job performance requirements down into individual components or parts.  
(This will be basically accomplished in Step 2.)  
  
Define and list the individual components. These are the **PERFORMANCE OBJECTIVES**.
  5. For those Performance Objectives identified in Step 4, prepare a list of questions which you would ask the employee to answer or actions to demonstrate to you, that upon completing the training, indicate that she/he can perform those objectives. The questions would include background knowledge and practical exercises, problems, etc. If the employee must use certain materials, equipment, or references in order to answer or perform the operation, specify what is needed.
  6. Using the information prepared in Step 5, write instructional objectives which will describe what the employee is to be able to do (what you want him/her to be able to do). Sometimes one instructional objective will apply to two or more questions. Evaluate results of Steps 5 and 6 to determine relevancy, specification and requirements established in Steps 1 and 2. Revise as necessary before proceeding to the next step.
  7. Sequence the instructional objectives and corresponding questions into logical blocks of instruction.
  8. Develop a student response instrument. The response instrument, instructional objectives, questions, and exercises, (post-test items for each block) must parallel each other in content and meaning. Revise it as needed.
  9. Select the methods, media, content, and materials based on results in Step 8.



## Procedural Guide for Designing Instruction

10. Using the result of Steps 6, 7, 8, and 9, develop the block of instruction.

Repeat the process for each block.

11. Finish the final examination using the results of Step 2 and 5.

12. & 13. Validate the course by giving it to a few students (you may want to include a few experienced subject matter specialists in your test run of the course). The validation does not have to be done all at one time. You can validate each of several blocks as they are completed. Revise it as needed.

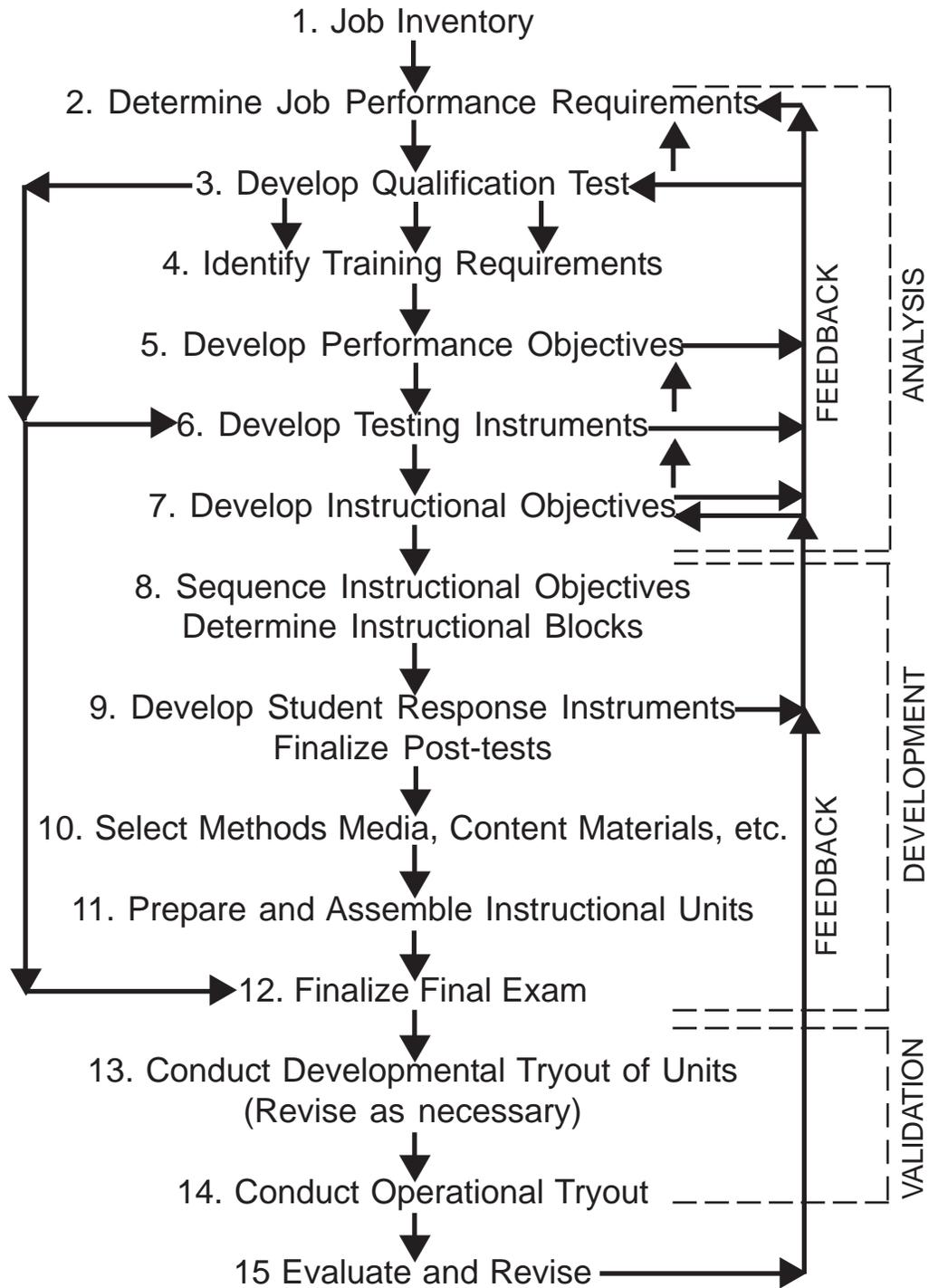
14. Prepare the final course materials.

15. Conduct the course.

16. Evaluate and revise.



# SYSTEMATIC STEPS FOR DEVELOPING INSTRUCTION





# Unit 7

## Training Development Steps



## TRAINING DEVELOPMENT STEPS

The following process and forms are derived from the OFDA publication *Guidelines and Format For Course Development*. The horizontal planning process has proven to be a very effective method for training development.

### 1. Determine desired student performance

The process of conducting the Job Inventory, Task Analysis, and developing Job Performance Requirements determines the desired performance on the job. From this work, the desired student performance after training is determined. This performance is described in the Performance Objectives for the training.

### 2. Develop Test/Evaluation for desired performance

From the performance objectives, determine how the participant will be tested or evaluated for satisfactory completion of the training. Write this test or evaluation within the context of a training situation. Include the actions to be performed, the conditions (classroom, resources available, simulated conditions, etc.), and the standards for measurement.

### 3. Write Instructional Objectives

Continuing the steps in training course development, after you have developed the draft final exam you are now ready to write the Instructional Objectives. The key source of information is the task analysis. Usually the task listing will convert directly into Instructional Objectives. Arranging the Instructional Objectives into logical blocks using one of the several methods available results in a draft outline of the units of instruction. These Objectives and the units of instruction will probably need revision as this planning process evolves.

### 4. Develop 3 or 4 main points

For each Instructional Objective, develop the 3 or 4 main points to be taught about the objective. Sequence the main points.

General to specific

Simple to complex

Frequency of use

Most important to least important

### 5. List facts/supporting information

Here is where the horizontal process begins. The graphic that follows depicts one way of organising the information. Develop a list of the facts and supporting information that may be used to teach each main point; (must know, should know, nice to know).

some will already be known,  
some will not be needed,  
some will be “figured” out,  
what’s left needs to be taught.

After the list of facts and supporting information is made and the unnecessary and irrelevant have been removed, put the remaining information in order of importance. The most important first and the least important last. This will make it much easier to “cut” if that becomes necessary.



## 6. Identify new vocabulary, concepts, procedures (V. C. P.)

From the possible content to be included in a lesson identify the following:

- VOCABULARY – any word that needs to be defined or re-defined by the trainer.
- CONCEPTS – any non-procedural explanation. Concepts help the learner understand how to achieve a desired outcome or why things work the way they do.
- PROCEDURE – a specific action to be taken. Usually some step-by-step process. Frequently, procedures can be given in a job aid format.

Review your VCP's to see what you really need to meet your objective. The following are guides for applying VCP to Course/Lesson design.

- A learner can absorb about 6 – 8 V's an hour.
- Concepts should be limited to 1 – 3 an hour.
- Procedures can be taught in large numbers (with proper documentation or job aids).

## 7. Determine training method

Several references are available to provide guidance in the selection of the method of instruction. The basic choices are individual study, classroom or on-the-job (OJT). If classroom, then will it be an Interactive Lecture or a Demonstration/Practice. Among the factors that affect these choices are:

- Number of learners
- Costs
- Content
- Life span of the material

## 8. Outline presentation

A first draft of the presentation can now be made using the results of the planning process. Start with an outline. The content can be expanded later. Once the presentation is outlined, then the time to present the material should be estimated. When estimating the needed time, consider the following:

EFFECTIVE LEARNING TIME (E.L.T.):

- is related to learning;
- can be used as a predictor of the amount of learning that is taking place in the classroom;
- is the number of minutes per hour when the instructor is effectively teaching new material and the student is attending to the teaching technique.

In order to determine the E.L.T., the following factors should be considered:

1. Settle in time – non-instructional, participant-driven. When does the lesson occur? First thing in the morning or right after lunch or a break will cause additional settle in time. Was the preceding lesson highly interactive with lots of student activity?
2. Administrative time – non-instructional, instructor driven. Are there materials or equipment to distribute? Non-instructional information to pass on? Administrative details?



3. Remedial Time – review. The first lesson of the day or right after lunch may have to include time to review the previous or earlier lessons.
4. Motivational Time – selling, relating experiences. New concepts or controversial procedures may require the instructor to spend time selling the new ideas before he/she can actually start instructing. The trainee needs to know “of what benefit is this training/instruction to me.”
5. Available Time – time left, “window of opportunity” for teaching. After all of the above have been deducted from the time allocated for the lesson, the time left is what is available for instruction.
6. Effective Instructional Time – the amount of available time used effectively. Ineffective training techniques, poor visual aids and lack of interaction further reduce the time that is effectively used.
7. LEARNER Attention Time – attention span may differ with age or situation. Consider the learning skills of your participants. Do they come from an office-administrative environment where paying attention to information and details is routine, or are they from an environment that will make learning in a classroom difficult? This will greatly affect the amount of time which can be spent on information giving without learner activities and interaction.

E.L.T. then is the overlap of when the instructor is effectively training and the learner is actively attending to the instruction.

### **9. Identify support materials needed (audiovisual, handouts, job aids, object aids)**

A participant workbook with note-taking guides is a very good way to assist learners in organising their thoughts. *Vocabulary* needs written reinforcement with support material. *Concepts* usually need some visual help for understanding. Any *procedure or process* will be strongly supported with a job aid or checklist.

### **10. Complete draft course materials**

Fully develop the lesson plan, complete the support materials, and determine equipment needs.

### **11. Try it, revise and try again**



## HORIZONTAL PLANNING

### OBJECTIVE

MAIN POINT 1
PRIORITY
FACTS
Supporting Information
NEW VOCABULARY
NEW CONCEPTS
NEW PROCEDURES
VISUAL AIDS
EST. TIME

MAIN POINT 2
PRIORITY
FACTS
Supporting Information
NEW VOCABULARY
NEW CONCEPTS
NEW PROCEDURES
VISUAL AIDS
EST. TIME

MAIN POINT 3
PRIORITY
FACTS
Supporting Information
NEW VOCABULARY
NEW CONCEPTS
NEW PROCEDURES
VISUAL AIDS
EST. TIME



## DETAILED LESSON PLAN OUTLINE

COURSE:

UNIT:

LESSON:

SUGGESTED TIME:

TRAINING AIDS NEEDED:

OBJECTIVE(S):

A/V AIDS	OUTLINE	NOTES

A/V AIDS

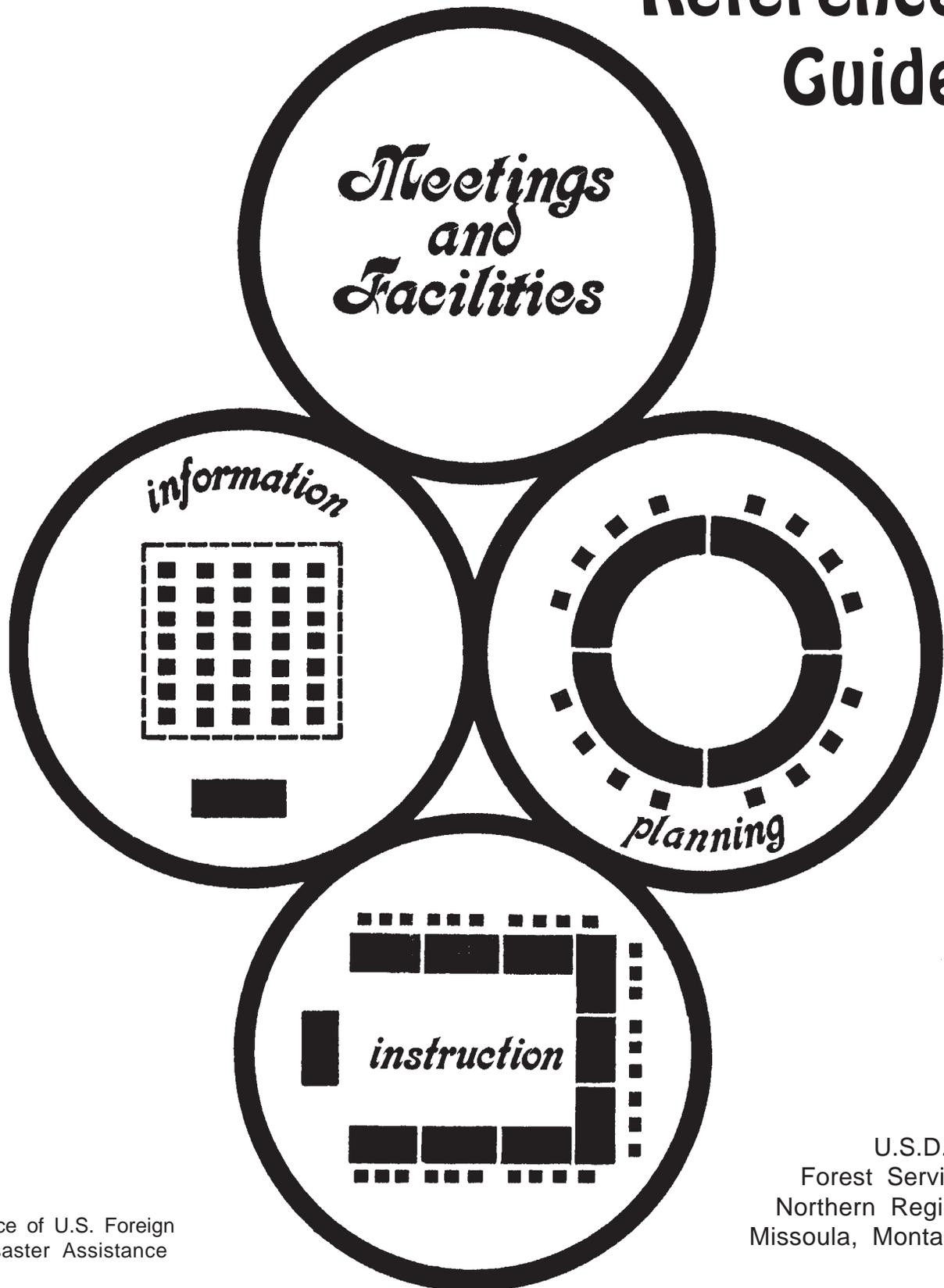
OUTLINE

NOTES

A/V AIDS	OUTLINE	NOTES



# Unit 9 Reference Guide





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## INTRODUCTION

You want to hold a meeting! What is the purpose? What are the objectives? What type of meeting should it be? What methods should be used? Where should it be held? Who should attend?

These are a few questions meeting planners must answer. Many meetings fall short of the intended objectives because of inadequate planning. Such failures can be traced to a lack of knowledge and application of basic planning principles and methods for achieving effective meetings.

This reference has been prepared to assist those who plan meetings and provide the manager an overview of what must be accomplished in the planning process. There are many aspects of planning. The most basic elements are presented here.

The terminology and techniques given in this booklet are recognized and accepted by most professional meeting specialists.

*Hubert R. Humes*



## MEETINGS

**DEFINITION:** A meeting is a selected group of individuals assembled to accomplish one or more predetermined objectives or to receive certain information. The purpose of a meeting is to inform, to instruct, to plan or to solve problems. Specific objectives are required for instruction, planning or problem solving meetings.

### Purpose and Titles

Various titles are given to meetings. When used correctly, these titles can convey to the participant the general purpose of the meeting. Listed are the common titles used for each purpose.

PURPOSE	TITLE
Information "To Inform"	Seminar Symposium Forum Briefing Convention Conference
Instruction "To Instruct"	Training Course Workshop Clinic Institute Laboratory Conference
Problem Solving "To Plan," "To Solve"	Workshop Conference

"Conference" is a general title which can be used for any meeting. It doesn't always convey purpose.

"Workshop" can be used for either instruction or planning type meetings. The title workshop means "hands-on" – participants are actively engaged in performing specified activities. Workshops usually produce a result or product.

## Instruction Meetings

Instructional programmes are to instruct, to teach new skills and knowledges. The instruction is based on well defined performance and instructional objectives. The instruction should be designed to gain full involvement and participation of participants. Instructional meetings are the most difficult to plan. The instructional components required are objectives, interactive aids, feedback, and tests. Instructional meetings must be designed to develop competencies specified in the objectives, not simply to inform students. Too often information methods are used when instructional methods are required. Information presentations are often given and acceptable in instructional meetings. Information presentations should be less than 10 percent of the total programme.

TYPES OR TITLES
Training Course Workshop Clinic Institute Laboratory Conference
METHODS
Demonstration/Practice Interactive Lecture Guided Discussion Role Playing Simulation Case Study Incident Process Group Scheduled Study Individual Self-Study Laboratory Exercises



### Planning or Problem-Solving Meetings

A successful planning or problem-solving meeting capitalizes on the existing skill, knowledge and experience of the group in order to develop plans, solutions, decisions, and other specifications for actions to be taken. Planning or Problem-Solving Meetings are designed to meet pre-determined objectives.

There is an old joke that a camel is a horse designed by a committee. It points to the inefficiencies and confusion that can result from a poorly designed and/or poorly managed planning session. There is one human relations consideration here. A planning session functions on the assumption that no solution or plan has already been made. If a decision has already been made by higher management, it is dangerous to hold a meeting where the participants think that they are planning or solving problems when they are not. It is not appropriate to run such a session with the idea of guiding the group into arriving at the already-made decision, since that plan can go awry.

<p style="text-align: center;"><b>TYPES OR TITLES</b></p> <p style="text-align: center;">Workshop Conference</p> <p style="text-align: center;"><b>METHODS</b></p> <p style="text-align: center;">Brainstorming Group Procedure Problem Solving “Buzz” Session Dialogue/Discussion</p>
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### Information Meetings

Information meetings are designed to inform – to present and discuss issues, new ideas, experiences, results of studies, etc. They are the easiest to plan because there are no specific objectives. Participants are not expected to make any decisions or learn specified skills to be applied on the job. There is no testing with information meetings. Sometimes a portion of the meeting may be devoted to instruction or problem solving. If a major portion of the meeting is “to inform” it should be considered and designed as an information meeting.

<p style="text-align: center;"><b>TYPES OR TITLES</b></p> <p style="text-align: center;">Seminar Symposium Forum Briefing Convention Conference</p> <p style="text-align: center;"><b>METHODS</b></p> <p style="text-align: center;">Lecture Discussion Panel Round Table Question/Answer Reporting Briefing</p>
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## PLANNING MEETINGS

### Planning Committee

Planning committees are often appointed to serve as the liaison between management and the meeting organizers. To be effective, members should include representatives who reflect the needs of the various factions represented, who have considerable experience in dealing with meeting dynamics and design, and who have a grasp of the subject matter. The role and objectives of the committee must be clear. If empowered to decide, the final decisions should be made by the chairman of the committee. When some decisions (i.e., administrative duties, contracts, etc.) are the responsibility of the meeting planners and staff, their authority should be specified.

Functions of the committee:

1. Finalize specific needs of the participants.
2. Formulate or finalize the specific objectives.
3. Approve or make recommendations on time, place, programme plan, facilities, etc.
4. Plan for evaluation and follow-up.

Disadvantages of the committee approach:

1. Too many members assigned.
2. Lack of expertise in meeting dynamics and planning.
3. May require too much time to reach agreement.
4. Tendency to assume responsibility of planners and officers.

### The Programme Coordinator

#### Task Requirements

Given the responsibility for planning and managing the meeting programme, the programme coordinator, alone or with others, will:

1. Specify or finalize meeting outcomes (objectives).
2. Develop a programme “blueprint” (includes structures, methods, sequencing, time limits, etc.).

3. Select and/or develop content, visual aid material, etc.
4. Select speakers or instructors and provide them with instructions.
5. Notify participants.
6. Manage the programme activities during the meeting, if necessary.
7. Evaluate meeting outcomes.
8. Serve as meeting chairman, speaker, instructor, monitor, panelist, or discussion leader, etc., if necessary.
9. Coordinate planning activities with the arrangements coordinator and other staff assigned to the project.
10. Supervise other personnel who may be assigned.

### The Arrangements Coordinator

#### Task Requirements

Given the responsibility for planning and administering the type of environment necessary to facilitate the attainment of the objectives set forth for a meeting, the arrangements coordinator will:

1. Advise the programme coordinator and others responsible for the meeting of the opportunities, limitations, and requirements concerning equipment and facility arrangement and management.
2. Plan and develop physical arrangements to fulfill the needs of the audience, the speaker, the programme’s objectives while giving consideration to programme time, funds, and travel requirements.
3. When necessary, prepare and submit to the contracting officer a requisition for facilities, supplies, and/or equipment.
4. Working closely with the contracting officer, contact and/or inspect, potential facilities.
5. In cooperation with the programme coordinator and the contracting officer, select the facility site.
6. Serve as the contracting officer’s representative and coordinator between the facility staff and the programme staff on all matters.



7. Reconcile differences among people on matters pertaining to the facility.
  8. Arrange for items such as: visual-aid and special equipment, supplies, transportation, registration, special meals, lodging, special rooms, etc., prior to and during the meeting.
  9. Inspect facility immediately before the programme to insure all arrangements are in order.
  10. Assume responsibility for protection and security of all property assigned.
  11. Assume supervision of other personnel who may be assigned to him.
  12. Operate projection and recording equipment as needed.
  13. Be alert to any safety hazards and correct or report such hazards to the proper officials.
5. What are the suggested dates and time periods?  
Alternate dates?  
Should evening sessions be considered?
  6. Who should handle the various planning activities and the meeting itself?  
Programme, facilities, equipment, news media, social events, etc.
  7. Who should attend?  
How many participants?  
Which people are absolute “musts”?
  8. Where should the meeting be held?  
In what city or location?  
What is an alternate location?  
What facility requirements are needed?

### Initial Planning considerations

1. Is a meeting the best way to accomplish the task?  
Would a phone call suffice?  
Could I send out a memo?  
Can I handle it informally?  
Job aids, self-study programmes, etc.?
  2. What’s the purpose of the meeting?  
What do I want to accomplish from it?
  3. What are the specific objectives?  
Are my statements realistic?  
Are the objectives measurable?  
Will I be satisfied if these objectives are achieved?
  4. When should the meeting be held?  
How much lead time do I need to prepare for the meeting?  
Are others available?  
Sufficient time to achieve the objectives.
9. What are the budget limitations?
  10. Special events or activities (social, field trips, , etc.) should be considered?



## PURPOSE AND OBJECTIVES

### Establishing the Purpose and Objectives

All meetings are held for a reason to accomplish some end. Thus, a “purpose” statement should be prepared for each meeting describing “why” and “intent.”

“Instruction” and “Planning or Problem Solving” meetings are designed to produce certain outcomes or results. Thus, specific objectives are required also for these types of functions. There are no objectives for “Information” meetings because there is no required outcome produced.

### PURPOSE vs. OBJECTIVES

Most novice planners believe the “purpose” and the “objectives” are one and the same. They are distinctively different.

*Purpose:* A written statement which describes why the meeting is needed and what the meeting is intended to accomplish.

*Objective(s):* Written statements which specify what the participant is expected to accomplish during the meeting. Statements must be measurable and specify the action, condition and standards or product to be produced. (See examples below.)

The “purpose” and “objectives” should be given in the programme announcement and be given to the participants at the start of the meeting.

### Planning or Problem -Solving Meetings

Purpose

Examples – from different meetings:

“To finalize the budget revisions and project work plans...”

“To review and plan activities for the coming year.”

“Develop alternatives and recommend solutions to...”

“Review the results of the committee reports and determine what action is to be taken.”

“Find solutions to common problems.”

“This is a problem-solving meeting designed to identify specific problems in the administration of Personnel Management and to recommend what actions would be taken to correct these problems.”

Objectives

Examples – from different meetings:

“Given a problem in..., develop a list of alternatives and prepare a staff paper recommending what action should be taken.”

“Given a list of indicated problem areas in the administration of personnel Management:

1. Determine what the problem(s) are for each area and prepare a problem statement. The statement will be specific, clear and concise.
2. Develop a list of standards, criteria or requirements which should be considered in the solution of each problem.
3. Develop at least two alternative solutions including...

### Information Meetings

Purpose

Examples:

“This meeting is designed to acquaint the manager and meeting Planner in the basic principles and techniques of planning and designing meetings. Each participant will receive a reference guide.”

“To brief and bring employees up to date on ...”

Objectives:

None. This meeting is designed to inform - nothing more. The participant may select and utilize whatever information he/she chooses.



## Instruction (Training) Meetings

### Purpose

Examples – from different training courses:

“Develop skills to meet minimum standards for officers designated to issue violation Notices.”

“A training course designed to develop skills in conducting and managing meetings.”

“This programme is designed to aid the manager and principal staff personnel in the use and application of analytical decision making models aided by the computer.”

### Objectives

There are two kinds of objectives used for each training function. They are:

#### *Performance Objectives*

A statement of performance clearly stating the task actions or decisions which the student must be able to perform upon completion of the training; the conditions under which these actions or decisions take place; and the standards or degree of perfection which must be met on the job. It contains one or a series of actions necessary to produce a specific, definable, and measurable product.

Examples – from several different training courses:

“GIVEN a hand compass and a 1:12,500 or larger scale map which specifies the starting point and target, DELINEATE on the map the best suitable route to the target and with proper field clothing and equipment, using the map and compass, navigate cross country, on foot, in daylight, over various types of terrain for distances up to 10-miles.”

“Make a complete technical inspection of timber, log or concrete multi-beam bridges and identify any defective items.”

“Given a series of work situations, identify and list what specific personal protective equipment is required for each situation.”

“Construct a diagram of the ‘decision-making process’ and establish a checklist for the evaluation of existing or potential application of math and computer models to the Agency operations.”

#### *Instructional Objectives*

A single action or decision statement which specifies each skill or knowledge competence a person must achieve during each block of instruction.

An Instructional Objective is a sub-element or smaller competence of the Performance Objective.

Instructional Objectives specify WHAT the trainee will do during the instruction. They are used to sequence and design instruction and become the testing requirements for which training must meet.

Examples – from several different training courses:

“Given a map and compass, delineate on the map the best route to travel between two points.”

“Name the 3 parts of an objective and specify how the objective must be described.”

“Fill in a traffic citation ticket.”

“Explain the difference between...”

“Convert binary coded symbols into hexadecimal symbols with at least 13 out of 15 conversions correct.”



## FACILITIES

### Types of Facility

There are basically five types of facilities to choose from: agency, hotels, motor inns, resorts, or schools and universities. Facilities come in all shapes and sizes, ages, qualities, and with varying kinds of space, flexibility, and support. You can usually select one which meets your needs.

#### Agency

Government regulations may prohibit the use of outside facilities when government facilities are available and meet program needs.

An agency is usually suitable for small groups for short durations. When the facility is in the same building where participants work, you can expect more interruptions such as interoffice messages, tardiness, visitors, and so forth. Generally, you will find little choice for physical arrangement or size of room. You probably will have to do all the work of arranging the room yourself. In this environment, there is little opportunity for after hour discussion among participants.

If it is important for the participants to forget the problems of their job and concentrate on the meeting programme, or if a “neutral environment” is considered essential, you should consider outside facilities away from the work location.

#### Hotel

Hotels are usually in the heart of the city, near major shops, attractions, and after hour activities. Though there may be ample eating establishments within or adjacent to the facility, you may have to provide more time in your schedule for the participants to obtain a noon meal. Parking may be a problem unless the facility has this accommodation. If so, they usually charge for it.

Large hotels usually offer the most in the way of room space, service, and support. In large hotels you will

find yourself competing with other meetings for services. At small hotels, you may be the only customer but have less choice of rooms and fewer staff to serve you.

#### Motel

Motels, as a whole, offer the greatest latitude and flexibility for fulfilling many of your needs – greater choice in location, fewer distractions, and easier parking. Many now specialize in offering meeting rooms; however, service may vary depending on size, staff, and experience. Usually, there is less choice in the size of meeting rooms.

#### Resorts

Old resort hotels have been converted to conference centre environments. Their room facilities are often surprisingly modern, flexible, and with many options available. They provide fewer distractions and parking is no problem. Basic disadvantages are remoteness and unavailability of public transportation.

#### Schools and Universities

Space may be available in local public schools, particularly during the summer and evenings. They typically use table arm chairs, and may not have the type of tables you need.

Local community colleges, vocational schools, colleges and universities may have appropriate space. If the facility is new, you might find all of the flexibility you need. Scheduling, parking, and services rendered can present problems.



## ACCOMPLISHING THE ASSIGNMENT

An experienced arrangements coordinator knows that reserving and confirming meeting rooms is only a small part of the job in making physical arrangements. Where do you begin? What information is needed? What features or details need to be considered? By this time you may be asking yourself these kinds of questions. Below and in the sections to follow, you will find sufficient information, specifications, guidelines, and job aids to enable you to accomplish your assignment. Naturally, it is impossible for us to cover every detail or problem which may arise. For special or complex problems and situations, we suggest seeking the advice and or assistance of an experienced arrangements coordinator.

### Information Needed:

Before you can begin to arrange for facilities, you will need certain information and data from the programme planner or coordinator.

1. Proposed dates and time periods? Alternative dates? Are evening sessions being planned?
2. How many participants, staff, guest speakers, observers, visitors and any others will attend for whom interpreters, space and/or material must be provided?
3. What type of multi-media presentations will be scheduled?
4. What are the objectives of the meeting?
5. What is the purpose or function – instructing, planning, problem solving or informing, or a combination of these?
6. What type of atmosphere is desired?
7. What kind of interaction is desired: primarily between speakers, speaker and participants, among participants, or a combination?
8. What materials will the participants require?
9. What presentation methods are planned? When? In what sequence?
10. Will the total group be divided into small teams? When? How often? How many teams? How many people per team?
11. Where are most of the participants coming from?
12. Are there any special requirements needed or activities planned?
13. How are the participants travelling? When should they be expected to arrive? Will a liaison be needed to meet them?
14. What and how much material is needed for each participant? How will the material be distributed or made available? Who is responsible for getting it there?
15. How much is budgeted for: facilities, rental or purchase of equipment, materials, and supplies?
16. What type of equipment (projection, recording or PA system) is planned or needed? Who is to furnish it?
17. Will a certificate be awarded? Will it be for participation, attendance, merit or achievements?

## PLANNING AND PROGRAMMING

MEETING: \_\_\_\_\_

DATES: \_\_\_\_\_

LOCATION: \_\_\_\_\_

TASK	DUE DATE	ASSIGNED TO	COMPLETED
<b>A. PLANNING</b>			
1. Plan programme			
2. Prepare announcement			
3. Prepare schedule			
4. Select staff			
5. Assign staff			
6. Assign coordinator			
<b>B. CONTRACT/AGREEMENT</b>			
1. Prepare specifications			
2. Issue bids			
3. Award contract/agreement			
<b>C. FACILITIES</b>			
1. Prepare requisition			
2. Prepare layout plan			
3. Check facilities			
4. Set-up room(s)			
<b>D. PARTICIPATION</b>			
1. Select candidates			
2. Notify agency			
3. Notify participants			

TASK	DUE DATE	ASSIGNED TO	COMPLETED
<p>E. PRE-WORK</p> <ol style="list-style-type: none"> <li>1. Prepare materials</li> <li>2. Assemble materials</li> <li>3. Send materials</li> <li>4. Follow-up with participants</li> <li>5. Receive, check &amp; collate</li> </ol>			
<p>F. EQUIPMENT, MATERIALS &amp; SUPPLIES</p> <ol style="list-style-type: none"> <li>1. Prepare list</li> <li>2. Prepare materials</li> <li>3. Assemble materials</li> <li>4. Order supplies/equipment</li> <li>5. Collect equipment, materials and supplies.</li> </ol>			
<p>G. OTHER</p> <hr/> <hr/> <hr/> <hr/>			

## ARRANGEMENTS COORDINATOR CHECK LIST

NAME AND DATE OF MEETING: \_\_\_\_\_

LOCATION OF MEETING: \_\_\_\_\_

NEEDED  
COMPLETED

### 1. Initial Contacts

- \_\_\_ \_\_\_ Chamber of commerce
- \_\_\_ \_\_\_ News media
- \_\_\_ \_\_\_ Training office
- \_\_\_ \_\_\_ Contracting
- \_\_\_ \_\_\_ Public Transportation
- \_\_\_ \_\_\_ Budget and Finance

### 2. Information or Plans

- \_\_\_ \_\_\_ Program information
- \_\_\_ \_\_\_ Target planning dates
- \_\_\_ \_\_\_ Requisition for facilities
- \_\_\_ \_\_\_ Layout plan - contract specifications
- \_\_\_ \_\_\_ Contract of agreement
- \_\_\_ \_\_\_ Local contacts

### 3. Meetings

- \_\_\_ \_\_\_ Time and dates
- \_\_\_ \_\_\_ General meeting rooms
- \_\_\_ \_\_\_ Headquarters room
- \_\_\_ \_\_\_ Floor plan
- \_\_\_ \_\_\_ Physical layout
- \_\_\_ \_\_\_ Staging required
- \_\_\_ \_\_\_ Special lighting
- \_\_\_ \_\_\_ Tables
- \_\_\_ \_\_\_ Chairs
- \_\_\_ \_\_\_ Special features

NEEDED  
COMPLETED

### 4. Transportation

- \_\_\_ \_\_\_ Arrangements for transportation
- \_\_\_ \_\_\_ Early/late arrivals
- \_\_\_ \_\_\_ Parking space
- \_\_\_ \_\_\_ Instructions to attendees
- \_\_\_ \_\_\_ Buses for tours
- \_\_\_ \_\_\_ Service car or bus
- \_\_\_ \_\_\_ Car rentals or government cars
- \_\_\_ \_\_\_ Courtesy or guest parking card

### 5. Guest Speakers and Visitors

- \_\_\_ \_\_\_ Arrange lodging
- \_\_\_ \_\_\_ Arrival time
- \_\_\_ \_\_\_ Departure time
- \_\_\_ \_\_\_ Transportation
- \_\_\_ \_\_\_ Welcome arranged
- \_\_\_ \_\_\_ Name tags
- \_\_\_ \_\_\_ Notified of arrangement

### 6. Specific Equipment

- \_\_\_ \_\_\_ List of equipment needed
- \_\_\_ \_\_\_ List of equipment to be rented
- \_\_\_ \_\_\_ Rental equipment contacts
- \_\_\_ \_\_\_ Equipment operators
- \_\_\_ \_\_\_ Tool kit and repair parts
- \_\_\_ \_\_\_ Fire regulations
- \_\_\_ \_\_\_ Cost of extra equipment or services
- \_\_\_ \_\_\_ Telephones
- \_\_\_ \_\_\_ Flags
- \_\_\_ \_\_\_ Clerical staff
- \_\_\_ \_\_\_ Signs
- \_\_\_ \_\_\_ Arrangements for transporting
- \_\_\_ \_\_\_ Storage
- \_\_\_ \_\_\_ Security

NEEDED  
COMPLETED

### 7. Facility contacts

- Manager
- Bell Captain
- Catering Manager
- Service Manager
- Crisis contact
- Security Guard

### 8. Other Contacts

- Medical services
  - Police
  - Emergency auto repair
  - Equipment repair/rental
  - Telephone system
- 

### 9. Exhibits

- Number of exhibits
- Space requirements
- Installation instructions
- Dates of setup and dismantle
- Special signs
- Facility requirements
- Shipping arrangements
- Storage
- Security
- Personnel to handle

### 10. Registration

- Approximate time required
- Location
- Badges
- Personnel
- Tables # \_\_\_\_\_
- Chairs # \_\_\_\_\_
- Typewriters/computer
- Supplies
- Signs
- Lighting

NEEDED  
COMPLETED

### 11. Banquet, Special events

- Floor plans of rooms
- Dates and times of events
- Layout and seating plan
- Choice of menus
- Complimentary meals
- Place cards
- Coat room
- Hospitality arrangements
- Registration and collection
- Tipping information
- Informing attendees
- Total expected

### 12. Lodging and meals

- Approximate rooms needed
- Room rates
- Reservation procedures
- Cutoff dates
- Early/late arrivals arrangements
- Cancellations
- Checkout arrangements/storage
- Payment policy (checks, etc.)
- Restaurants available
- Other requirements
- Informing attendees

### 13. Miscellaneous

- Refreshments service
  - First aid station
  - Local service club meetings
  - Special events - entertainment
  - Telephones
  - Bulletin boards
  - File boxes
  - Water-glasses
  - Recreation available
  - Lost and found
  - Publicity
-

## ARRANGEMENT ANALYSIS

### Codes

View and group interaction	Size	Atmosphere	Best Uses
E=Excellent G=Good F=Fair P=Poor	S=Small 4-15 M=Medium 15-40 L=Large 40+	I=Informal F=Formal	Inf.=Information meetings TR=Training meetings PS=Problem solving planning meetings

TYPE OF SETUP	VIEW	INTERACTION	SIZE	ATMOSPHERE	BEST USES
---------------	------	-------------	------	------------	-----------

#### Conference

U-shape	G	G	M	I or F	Inf.
Box shape	G	G	M	I	PS
U-shape tier	E	G	M	I or F	TR
E-shape	F	F	L	I or F	Inf
T-shape	F	G	M	F	Inf
Board of directors	P	P-F	M	F	Inf
Oval shape	G	G	M	I	PS

#### Small group

Diamond	G	G-E	M	I	TR-PS
Round table	E	E	M	I	TR-PS
Circle (w/o tables)	E	E	M	I	TR-PS
Triangle	G	G-E	M	I	PS
Rectangle	F-G	F-G	S	I or F	TR-PS
Oval	G	G	S	I or F	TR-PS
Trapezoidal	G	G-E	S	I	TR-PS
Square, V or L shape	G	G-E	S-M	I	TR-PS

#### Auditorium

Square	F	P	L	F	Inf
Semicircular	G	P	L	F	Inf
V-shape	F-G	P	L	F	Inf

#### School room

Square P	P-F	P	L	F	Inf-TR
Perpendicular	P	P	L	F	Inf-TR
Common V	G	F-G	M	I	TR
Inverted V	F-G	F-G	M	I	TR

# BASIC SPACING AND SEATING GUIDELINES

## SPACING

1. Between front wall and first row of tables ..... 10 ft.
2. Aisle space along sidewalls ..... 2 ft.
3. Main aisle width ..... 4 ft.
4. Between rows of tables ..... 4 ft.
5. Allowance for chair space from table ..... 3 ft.
6. Between rows of tables when seating people back-to-back ..... 5 ft.
7. Back of room: Distance from table to wall (includes chair space) ..... 8 ft.
8. Table writing space (per person) ..... 2 1/2-3 ft.

## SEATING

### Rectangular Table (each side)

5 foot .....	2
6 foot .....	2
8 foot .....	3

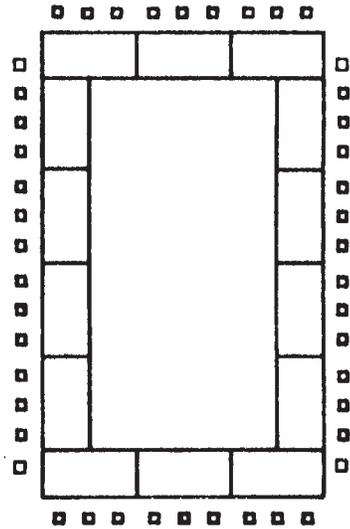
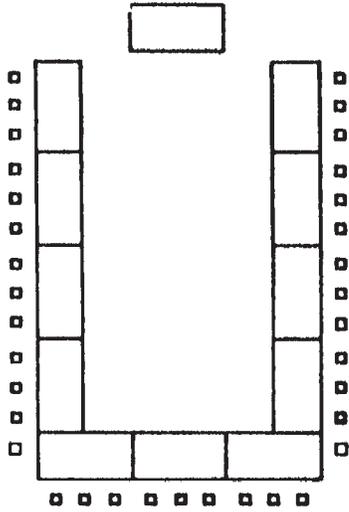
### Round table

4 foot .....	6
5 foot .....	8
6 foot .....	10

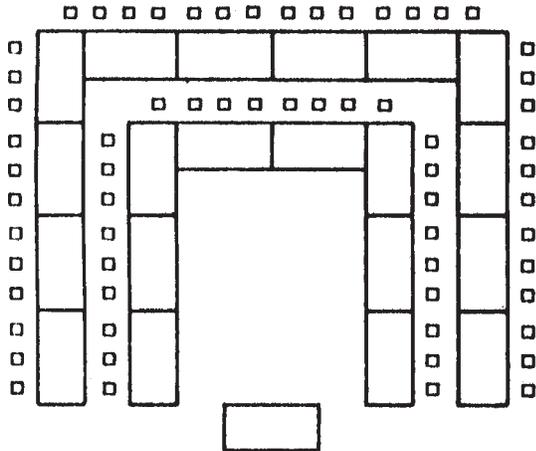
FIGURE A

CONFERENCE SETUPS

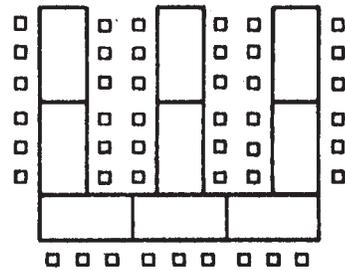
U - SHAPE



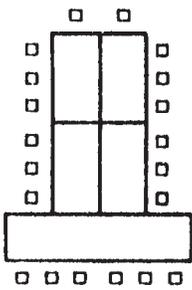
BOX SHAPE  
(Square or Rectangle)



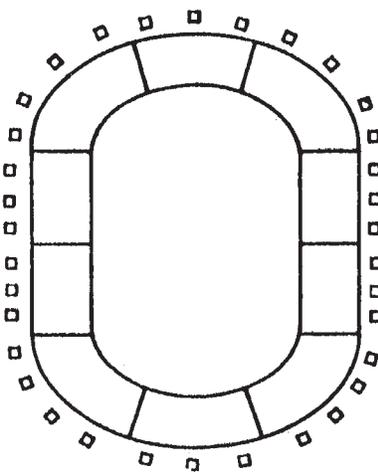
U - SHAPE TIER



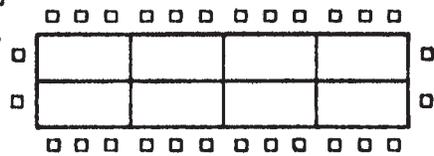
E - SHAPE



T - SHAPE



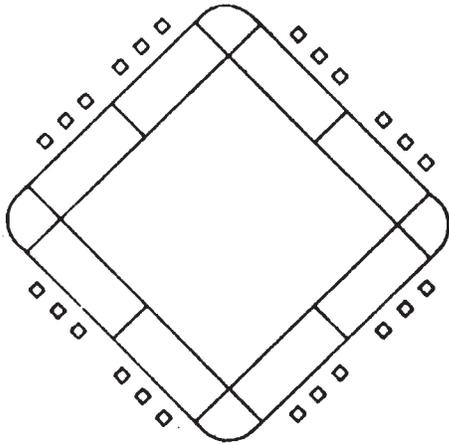
OVAL SHAPE



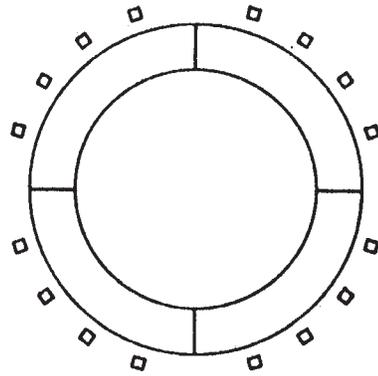
BOARD OF DIRECTORS

FIGURE B

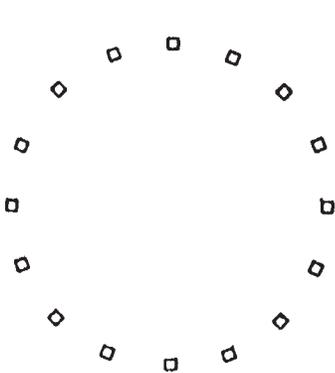
SMALL GROUP SETUPS



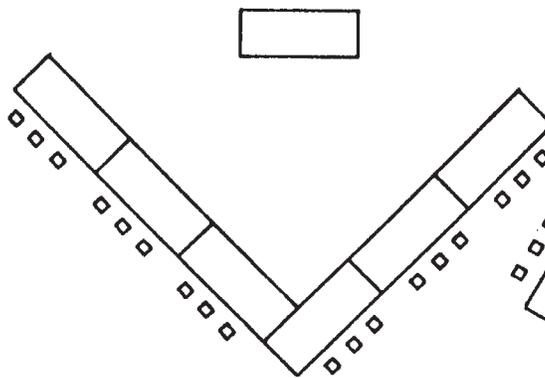
DIAMOND SHAPE



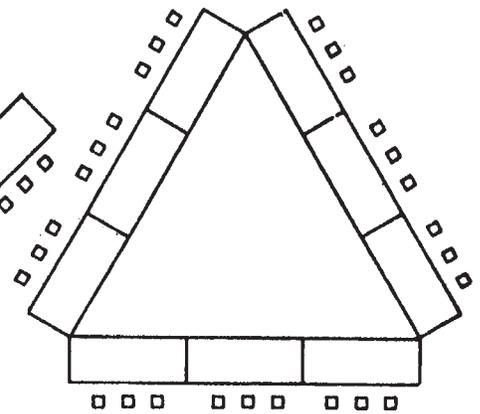
ROUND TABLE



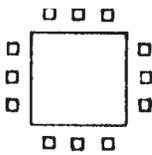
CIRCLE  
(Without tables)



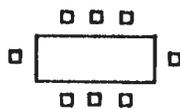
V (or L) SHAPE



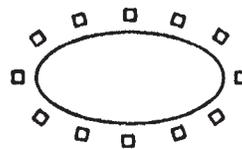
TRIANGLE



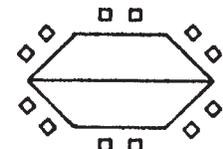
SQUARE



RECTANGLE



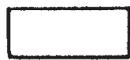
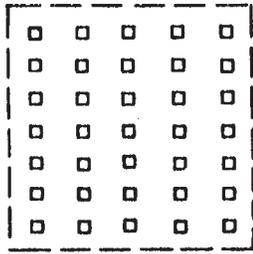
OVAL



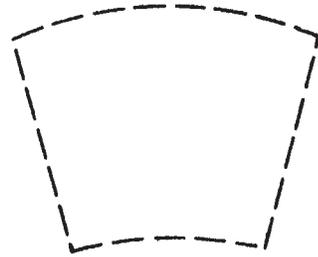
TRAPEZOIDAL

FIGURE C

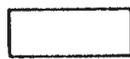
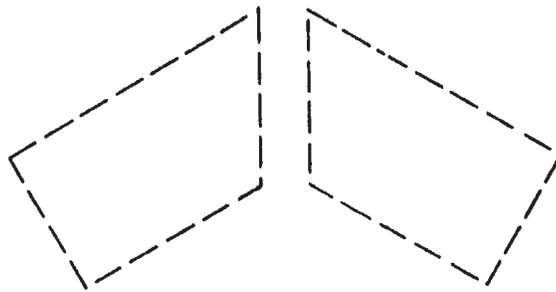
AUDITORIUM OR THEATER SETUPS



SQUARE

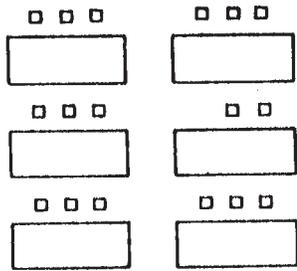


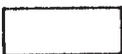
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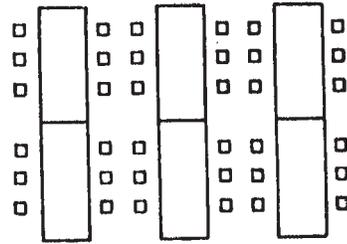


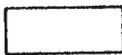
V - SHAPE

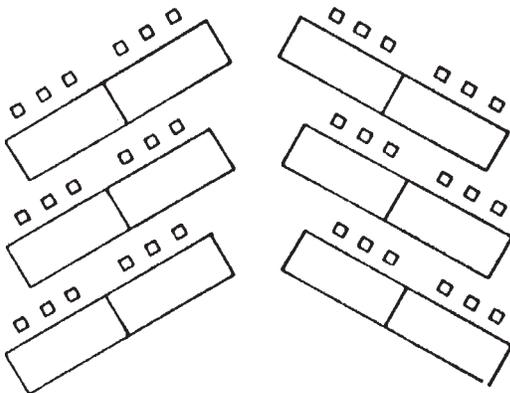
FIGURE D  
SCHOOLROOM SETUPS



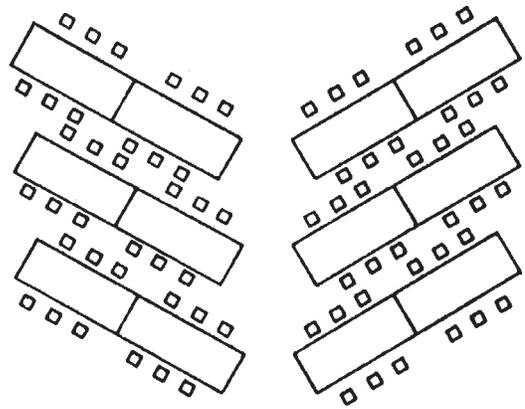
  
SQUARE  
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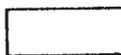


  
PERPENDICULAR



  
COMMON V



  
INVERTED V

V - SHAPE



# Unit 10

# CLASSROOM MANAGEMENT

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# CLASSROOM MANAGEMENT

An instructor may be thoroughly skilled in the subject to be presented. The students may be attending classes regularly. The instructor may be performing to the best of his/her ability. There is still no guarantee of success in accomplishing the objectives. The circumstances under which the training is conducted are frequently the determining factor.

Instructors, in their own way, are executives. They are responsible for people, time and materials. They must plan, establish or execute policies, and see that tasks are completed. They are responsible for equipment and materials used in the classes. They must be able to write reports and evaluate papers submitted by students. They perform, on a smaller scale, all the fundamental responsibilities of a manager. They are fully responsible for everything related to the instruction.

Likewise, the success or failure of a well-conceived programme of instruction depends strongly on the manner in which it is conducted. The achievement of the objective, regardless of its description in subject matter terms, demands that the instructor employs effective policies, procedures, and techniques in the conduct of the class – in other words “effective class management.”

This reference is devoted to the discussion of problem areas relating to “classroom management”. The focus will be on the responsibility of the instructor for anticipating events that might affect instruction unfavourably. It will point the way to solutions of events that, when unsolved, result in loss of rapport; interference or breakdown in discipline; and other forms of deterioration of the learning process.

## DEFINITION

Classroom management is defined as the employment of those policies, procedures, and techniques that are designed to secure effective student learning.

Using this basis, we shall examine some of the details concerning classroom management techniques. We will suggest how best they may be applied to situations that will confront you as an instructor.

A mistake made by many inexperienced instructors is to assume that their influence on class begins at the “opening bell” and ends with the “closing bell”. They might be surprised, if they could eavesdrop on some of the participants.

The reputation of a course and the instructors frequently precede them. The manner in which the first lesson is conducted will affect the participants’ attitudes toward the instructors and their subject. Such comments as: “I wouldn’t open my mouth in that class”, “I couldn’t hear”, or “It was so stuffy in there, I went to sleep” are not just gripes or alibis. They are legitimate complaints, and will not occur if instructors are alert. They can demonstrate alertness by carefully considering and planning for the three basic elements of effective class management. These are:

1. Well-planned physical arrangements before, during and after class.
2. Sound class policies which will:
  - Maintain discipline
  - Encourage learning
3. Successful instructor-student relationships.



## PHYSICAL ARRANGEMENTS

The instructor is responsible for the physical set-up of the classroom. Areas to consider are:

**Lighting.** The room should be properly lit so participants can see their notes and visual aids without undue strain on their eyes. Is the room able to be darkened if you are going to use projection aids? Are black-out curtains or blinds needed? How are the lights dimmed and who will control the lights?

**Heating/Cooling.** The instructor must take the necessary steps to insure having a comfortable environment. If the room is uncomfortable, make the necessary adjustments. Throughout the lesson, watch for signs of participant discomfort and ask for feedback. The classroom should be adequately ventilated. Prohibiting smoking and eating will help.

**Training Aids.** Training aids should be placed in such a manner that they can be handled easily and smoothly. It is the responsibility of the instructor to see that all aids scheduled to be used are available and located in the room.

**Room arrangement.** Use comfortable chairs and tables, arranged to provide maximum visibility and interaction between participants and instructor. A number of options are described in other references.

**Seating Plan.** You may want to arrange the name cards to separate normal work groups or problem participants. Participants should be guided to their proper places by the instructors. This will help you to learn their names quicker. A participant seating plan placed at the lectern may aid the instructor in calling on the participants by name.

## CLASS POLICIES

Make class policies clear at the start. If the instructor clarifies the standard operating procedure, there can be little doubt on the part of the participants as to what is expected. Also, participants feel more secure when they know what they are supposed to do. Follow standards if already set, if not, define:

**Smoking.** Uncontrolled smoking in the classroom will result in a smoke-filled room which creates discomfort to participants. All people do not smoke, and the eyes of some people are irritated by smoke. Normally, smoking is not permitted except during breaks. The instructor should be held responsible for the enforcement of this policy.

**Dress.** Usually nothing needs to be said. However, if someone comes dressed inappropriately (distracting, hazardous, etc.) for the class, the instructor should address the problem on an individual basis.

**Stand up.** Participants should normally not be required to stand up when asking or answering questions. If the group is large or there is a problem hearing you need to ask participants in the back of the room to stand.

**Absences.** The policy on absences should be given in the course announcement information and then re-stated at the beginning. If full attendance is required for successful completion than it should be stated and then enforced. However, the instructors should have an answer for emergencies such as an illness, etc.

**Timeliness.** Lessons must begin and end on time. Time cues for the conduct of the lesson are determined by “dry-running” and serve as a guide. Schedules are made to be followed.



Every instructor should ensure that he/she is ready to begin on time and end on time. When an instructor arrives late, the participants may think the instructor is not interested in the presentation of the lesson and a possible result will be the students will lose interest in the presentation. Completion of a lesson in less than the allotted time usually results in incomplete coverage of all the teaching points.

If the instructor runs over the scheduled time, he/she may cause resentment by the participants for running into their free time. An overrun will also effect the time allotted for the following lesson. Practise your lesson to ensure your timing is within the schedule. Participants also have a responsibility in timing – to be seated and prepared for the lesson according to the time schedule.

**Cleanliness.** It is the instructor's responsibility to ensure the training area is left in good condition. Remember the next instructor must begin on time. All training aids must be removed and trash cleaned up. Participants should be responsible for their areas. Report any deficiencies or items you are unable to correct to the course coordinator or management.

## STUDENT– INSTRUCTOR RELATIONSHIPS

**Control.** The instructor is the “Captain of the Ship” and must always act as a leader. The participants will respect the instructor more and will come prepared to learn, once they realize the standards will be maintained.

**Group Leader.** Under some circumstances an elected representative of the group may be useful. The group leader can represent the group to the instructors and provide group feedback on any problems. The instructor should inform the group leader of his duties and responsibilities.

**Familiarity.** Learn how to pronounce the participants' names before the class. Use name tags and table cards to help identify the participants. Meet and greet the participants as they come in to class for the first time so you can put faces to names.

**Develop cooperative attitudes.** One of the better ways to motivate participants and develop cooperative attitudes is to put into practice in the classroom the principles and techniques of leadership. Be flexible. Listen and support. Respond to participants needs.

**Appearance.** Your appearance as an instructor will directly influence the way the participants perceive you. Dress appropriately for the situation. If in doubt, ask other instructors or the local training experts.

**Tact.** Good discipline must be maintained at all times. The Arab who permitted a camel to put its head into his tent, soon found the camel occupying the tent and the Arab out in the cold. The moral of this is that there can be no compromise with discipline. It is either good or poor. The instructor who is inclined



to allow small infractions of policies in an effort to be a good fellow is asking for trouble. Small infractions lead to larger ones, and eventually you will lose control of the situation. At the first breach of good conduct, corrective action must be taken; tactfully, of course, but nevertheless with firmness. The group must know that standards are to be maintained.

**Know Your Participants.** A mistake made by many instructors is to assume all participants can be instructed in the same manner. Most instructors research the subject matter that they are going to teach and dry run the lesson before teaching. Too few instructors research the participants they are going to teach. The way an instructor teaches is as important as what he teaches. How subject matter is presented should be determined by the type of participants receiving it.

**Preparation.** The failure of the instructor to prepare will result in a disorganized lesson and confusion for the participant. You should carefully plan your lesson. Then practise, practise, practise.

**Confidence.** A lesson plan should be used as a guide, not as a crutch. Every instructor should be familiar with the subject matter. The lesson plan should be used as a check to ensure that all the essential teaching points have been covered. The greater the confidence the instructor displays, the more readily the participants will accept what is being presented.

**Discussion.** An instructor must be able to stimulate and guide group discussion. An unguided discussion will not enhance understanding by the participants – rather, it will usually confuse as well as waste valuable teaching time. At times, the participants will tend to veer away from the main teaching point. The instructor must guide the discussion back to the teaching point. One effective way of bringing a discussion back is to refer to the lesson objectives. When the participants are discussing essential points in greater depth than intended and time is of the essence, then the instructor should tactfully summarize the discussion and lead into the next teaching point.

**Be Patient.** Becoming hasty and impatient with a participant is sure to defeat any honest effort he/she may make to learn. Remember many of the ideas are new to the participant, but are part of an instructor's broad background. Participants see them as individual experiences not yet completely tied together. Rough spots require slow and thorough explanations to be sure they are understood before the next point is introduced.

**Avoid threats.** Generally, tactful handling of the situation will produce desired results. Once a threat is made, however, it should be carried out if the participant fails to respond. Otherwise these too become meaningless.

**Test to measure.** A test should never be used to punish participants. Occasions may arise when it is necessary to test to determine if the participants have prepared themselves for the instruction they are to receive. When tests are administered, they should always be graded and critiqued.



## HAZARDS

**Faking/Bluffing.** Evasive answers by an instructor leave the participant in doubt; both as to the instructor's ability and the value of the subject as a necessary part of the training. No instructor knows all the answers. There will be times when a participant may pose a question that he/she cannot answer. The participants will not hold it against the instructor for not knowing, but they do expect him/her to be honest with them. If he/she tries to bluff, the bluff will probably be called, and the confidence of the class in the instructor as an authority, will be irreparably damaged. The best policy is to say: "I am not sure of that, but I will look it up and let you know".

**Acting Superior.** Because the instructor may have command of the subject, which is far in excess of that held by others, is no valid reason for adopting superior attitudes. Talking down to participants is an excellent way to arouse resentment and destroy morale. The participants will respect you more for any inherent knowledge you may have of your subject. As a matter of fact, participants may be expert in some other field about which the instructor knows very little. Occasionally, instructors will find a participant who actually knows more about the subject than they do!

**Lack of Enthusiasm.** Following through on participants' questions and citing personal experiences and applications generally instills in the minds of the participants the feeling the instructor believes in 'the importance of the subject he is teaching. It is evidence of enthusiasm on his part, and enthusiasm is contagious! Once you have established this contact with the group, it should be kept alive. The instructor should look at

all the participants during instruction. Each participant should feel he/she is being spoken to personally. Occasionally, when a lesson is given over and over, there is a tendency for the instructor to become somewhat mechanical in the presentation. The effective instructor recognizes this pitfall and works harder to maintain participant interest.

**Profanity or vulgarity.** Another good way to destroy class interest, to lose the respect of the group, and to arouse antagonism is the use of profanity. Vulgarity on the part of the instructor definitely alienates the participants. In addition, it proves to the class his vocabulary is limited and sooner or later its use will prove to be a source of considerable embarrassment. This applies also to the use of jokes or stories of questionable tact. If a story is likely to embarrass or ridicule one person or group because of race, color, creed, sex or national origin, **it must not be used.**

**Excuses.** While it is the responsibility of the instructor to insure that everything is ready for his/her presentation, if something is forgotten, excuses should not be made. Apologizing because you forgot to bring an aid will only make the participants wonder if you are really interested both in the material being presented and the students receiving it. If equipment was scheduled for a lesson, and due to circumstances beyond your control, the equipment was not available, you may want to inform participants of the delay or cancellation.



**Weak summary.** The summary has a double purpose. It is designed to review the important teaching points and to tie this lesson to other lessons. The summary can be developed either by lecture method, or if time permits, by questions designed to measure how much the participants have learned during the presentation. The question method may reveal an occasional lack of understanding or, even more probable, a shortcoming in the instruction. The summary can guide the instructor to improving later lessons on the same subject.

## SUMMARY

This discussion has been concerned with two points: developing an understanding of the elements of classroom management, and determining how these elements should be applied to training situations.

There is nothing new or startling in the elements that have been presented or in the application of these elements to specific situations. Each is the outcome of common sense, fortified by prior planning. It has been demonstrated that the problems of classroom management are vitally important. The analysis of most situations shows that “an ounce of prevention is worth a pound of cure.” The best insurance against the development of an unfavourable classroom situation is to: first, check the physical arrangements before the class begins; second become thoroughly familiar with, and enforce, desirable classroom policies; and third, keep constantly in mind that good instructor–student relationships do not grow of their own accord. Anticipatory planning, regard for the human element in instruction, and the application of common sense will see the instructor through to his objective.