

# Designing and Delivering Training Programs

Instructor's Manual





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## Instructor's Manual

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**Key Areas:** 3 (Administration)

4 (Communications and Marketing)

**USDA Professional Standards Codes:** 3400 (Human Resources and Staff Training)

4100 (Communications and Marketing)

# **Institute of Child Nutrition**

## **The University of Mississippi**

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### **PURPOSE**

Improve the operation of child nutrition programs through research, education and training, and information dissemination.

### **VISION**

Lead the nation in providing research, education, and resources to promote excellence in child nutrition programs.

### **MISSION**

Provide relevant research-based information and services that advance the continuous improvement of child nutrition programs.

# Institute of Child Nutrition

## The University of Mississippi

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## Background Information

**Instructor's Note:** The purpose of the background information section is to help you become familiar with the context of the training. It is not a part of the training detail.

This face-to-face course, *Designing and Delivering Training Programs*, is part of an ongoing effort by the Institute of Child Nutrition (ICN) to establish and support a national network of trainers. Therefore, the intended audience for this course is anyone who wishes to become a more effective trainer. The curriculum was designed to assist participants in acquiring the knowledge and skills needed to design and deliver effective trainings, as well as encourage further professional development. ICN also designed this training to be interactive so the participants are actively involved in the learning process.

This Instructor's Manual was developed to assist you in facilitating the training. It serves as a step-by-step guide to what you should say, ask, and do. In preparation for your upcoming training, thoroughly review each of the curriculum components—Instructor's Manual, PowerPoint slides, and Participant's Workbook. Ensure you are comfortable enough to instruct the class without reading directly from the materials, yet can accurately convey what is written. This is important given that the content was designed to meet specific learning objectives. Give added attention to becoming familiar with the following Instructor's Manual prompts and their meanings.

**SAY:** What the instructor is to say to participants. This is the content that teaches the learning objectives.

**ASK:** This prompt is used when the instructor should ask the participants a question. If the question warrants feedback, it will be followed by the FEEDBACK prompt.

**FEEDBACK:** This prompt is used to ensure certain elements are covered in discussions, including possible answers for instructors to give.

**DO:** This prompt is used to explain what the instructor/participants are to do. It may be used to lead into activities, do demonstrations, show videos, or any other action the instructor would need to know to do.

**SHOW SLIDE:** This prompt is used for showing slides.



## Professional Standards

### **3400 – Human Resources and Staff Training**

Employee will be able to implement human resources management practices through maintenance and familiarity with current personnel policies and procedures and support employees through training and retention strategies.

3430 – Develop employee training plans, including a plan for tracking training.

### **4100 – Communications and Marketing**

Employee will be able to develop plans that include involvement with school and community members, empower school nutrition leaders, and address excellent customer service.

4140 – Develop communications skills.

#### **Key Area Codes:**

3 (Administration)

4 (Communications and Marketing)

## Training Objectives

By the end of this training, participants will:

- Identify and apply principles to enhance adult learning and knowledge retention.
- Create interactive, learner-focused lessons.
- Plan and deliver effective training programs.

## Ground Rules

ICN has developed the following Ground Rules to help this training run smoothly and allow all participants to benefit from the instruction and information.

- **Show up on time and come prepared.** Be prompt in arriving and in returning from breaks. Come with a positive attitude.
- **Stay mentally and physically present.** Be present and stay on task. Listen attentively to others and avoid disruptive side conversations.
- **Let everyone participate.** Be patient when listening to others speak. Treat all participants with the same respect that you would want from them.
- **Listen with an open mind.** Stay open to new ways of doing things and listen for understanding. You can respect another person's point of view without agreeing with them.
- **Think before speaking.** Seek first to understand, then to be understood. Avoid using idioms, three letter acronyms, and phrases that can be misunderstood.
- **Attack the problem, not the person.** Respectfully challenge the idea, not the person. Honest and constructive discussions are necessary to get the best results.

## Training-at-a-Glance

Time	Topic
<b>Introduction</b>	
30 minutes	<ul style="list-style-type: none"> <li>• Welcome and Introductions</li> <li>• Training Logistics</li> <li>• Training Pre-Assessment</li> </ul>
<b>Lesson 1: How Adults Learn</b>	
1 hour 30 minutes	<ul style="list-style-type: none"> <li>• Principles of Adult Learning</li> <li>• Five Moments of Learning Need</li> <li>• Cognitive Overload</li> <li>• Brain Rules</li> </ul>
<b>Lesson 2: Developing Effective Training Techniques</b>	
1 hour 40 minutes	<ul style="list-style-type: none"> <li>• Learning Objectives</li> <li>• ROPES Model</li> <li>• Methods for Presenting Content</li> <li>• Exercises to Reinforce Learning</li> </ul>
<b>Lesson 3: Planning and Logistics</b>	
1 hour 20 minutes	<ul style="list-style-type: none"> <li>• Preparation Checklists</li> <li>• Conducting a Scoping Call</li> <li>• Contingency Planning</li> <li>• Travel Logistics</li> </ul>
<b>Lesson 4: Delivering Effective Trainings</b>	
1 hour	<ul style="list-style-type: none"> <li>• Effective Openings/Gaining Audience's Attention</li> <li>• Verbal Cues</li> <li>• Nonverbal Cues</li> <li>• Avoiding Distracting Habits</li> </ul>
<b>Lesson 5: Application and Practice</b>	
1 hour 30 minutes	<ul style="list-style-type: none"> <li>• Utilizing the ROPES Model</li> <li>• Evaluation Rubrics</li> <li>• Presentation Anxiety</li> <li>• Delivering a Training</li> </ul>
<b>Wrap Up</b>	
30 minutes	<ul style="list-style-type: none"> <li>• Wrap Up</li> <li>• Training Post-Assessment</li> <li>• Evaluations/Certificates</li> </ul>
<b>Total Training Time: 8 hours</b>	



## Preparation Checklist

**Instructions:** The following tasks are necessary for presenting this lesson. Assign each task to a specific person and determine the date that each task must be completed. Keep track of the progress by checking off tasks as they are completed.

Task	Person Responsible	Completion Date	✓
<p><b>Reserve equipment and gather supplies as needed for use on the day of class (6 weeks prior).</b></p> <p><b>Instructor's Manual</b> Roster of participants attending for instructor Participants' sign-in sheets</p> <p><b>List of equipment and supplies needed</b></p> <ul style="list-style-type: none"> <li>• Microphone (preferably wireless)</li> <li>• Computer to present slides and/or DVD</li> <li>• Projector and screen</li> <li>• Speakers</li> <li>• Wireless presenter device and laser pointer</li> <li>Chart paper (self-adhesive strip sheets)</li> <li>Painter's tape (do not use masking tape)</li> <li>Markers</li> <li>• Pens, pencils, note paper, highlighters, large and small sticky note pads, page markers, index cards (each table)</li> <li>• Name tags and table tents</li> </ul>	Instructor		
Participant's Workbook			
Agenda, roster of presenters/participants, and handouts			
Pre-/Post-Assessments (available at <a href="http://www.theicn.org">www.theicn.org</a> )			
Write "Bike Rack" at the top of a sheet of chart paper			
Task Cards for Lesson 3: Planning and Logistics			
Training Beats posters for Lesson 2: Developing Effective Training Techniques			



## Lesson-at-a-Glance

Time Allowed	Topics	Activities	Materials
20 minutes	<ul style="list-style-type: none"> <li>• Welcome and Introductions</li> <li>• Training Logistics</li> </ul>	<ul style="list-style-type: none"> <li>• Head, Hands, Heart, and Home</li> </ul>	<ul style="list-style-type: none"> <li>• Participant's Workbook</li> <li>• Pen or pencil for each participant (needed throughout training)</li> </ul>
20 minutes	<ul style="list-style-type: none"> <li>• Assessment</li> </ul>	<ul style="list-style-type: none"> <li>• Complete Pre-Assessment</li> </ul>	<ul style="list-style-type: none"> <li>• Training Pre-Assessment</li> </ul>
<b>30 minutes</b>			



## Introduction

### **SHOW SLIDE: Designing and Delivering Training Programs**

**Instructor's Note:** As you greet participants, inform them that you will be circulating a sign-in sheet. Ensure all participants sign the sheet. This may require gentle follow-up reminders, especially if some participants arrive late.

**DO:** Introduce yourself and any special guests.

**SAY:** Welcome to Designing and Delivering Training Programs and thank you for coming!

The intended audience for this training is anyone who wishes to become a more effective trainer. The primary goal today is to introduce you to evidence-based concepts, techniques, and skills you can use to enhance your ability to foster adult learning. You will also be given opportunities to practice this new information, which will strengthen your confidence in designing and delivering trainings. Before we begin, there are a few things we need to cover.

**DO:**

- Direct participants' attention to the Ground Rules posters, and discuss the ground rules for the training. The rules are also listed in the Participant's Workbook.
- Explain the location of the restrooms, water fountain/beverages, etc.
- Confirm participants have all the necessary materials for the training.

### **SHOW SLIDE: Activity: Head, Hands, Heart, and Home**

**SAY:** Let's take a few minutes to get to know each other. To do so, we are going to complete an activity called Head, Hands, Heart, and Home.

**DO: Activity: Head, Hands, Heart, and Home**

## Activity: Head, Hands, Heart, and Home

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**Materials:**

- Ice Breaker Activity: **Head, Hands, Heart, Home** worksheet
- Pen or pencil for each participant

**Time:** Approximately 10–15 minutes (time will vary based on group size)

**Instructions:** Ask participants to turn to the worksheet in their Participant's Workbook. Tell them to write one word or phrase (preferably related to their role as an employee or trainer) that is relevant to each of the four *h* words listed. Explain that *head* represents something they are knowledgeable of, *hands* represent something they are good at doing, *heart* represents something they feel passionately about, and *home* represents where they are from/work. Give participants 2–3 minutes to complete this task. Then, ask each participant to share their name and what they wrote.

### Ice Breaker Activity: Head, Hands, Heart, Home

**Instructions:** Next to each word, write one word or phrase (preferably related to your role as an employee or trainer) that is relevant to each of the four *h* words listed. For the purpose of this activity, *head* represents something you are knowledgeable of, *hands* represent something you are good at doing, *heart* represents something you feel passionately about, and *home* represents where you are from/work.

**HEAD:** \_\_\_\_\_  
\_\_\_\_\_

**HANDS:** \_\_\_\_\_  
\_\_\_\_\_

**HEART:** \_\_\_\_\_  
\_\_\_\_\_

**HOME:** \_\_\_\_\_  
\_\_\_\_\_

**DO:** Thank participants for sharing with the group.

**SAY:** This training will cover a variety of topics, and questions are highly encouraged. Remember—the only “bad” question is the one you do not ask. If you do not feel comfortable asking a particular question among the group, please write it on a selfadhesive note, and post it to the “Bike Rack.”

**DO:** Explain the concept of the “Bike Rack” and your preferred strategy for placing and responding to questions placed on the rack.

**Instructor's Note:** Some trainers prefer to respond to questions when they are posed, others prefer to wait until a certain point in the training (e.g., at the end of a discussion topic or lesson or before a break). At times, your approach may need to vary based on your audience. It is acceptable for you to use the strategy that works best for you and the participants.

**SHOW SLIDE:** *Pre-Assessment*

**SAY:** Before we begin, you will need to take the **Training Pre-Assessment**. The assessments you will complete today are simply tools to help us determine whether the learning objectives for this course were met. Don't worry if you are unsure of the correct answers—you will have an opportunity to learn any unfamiliar information during the training.

**DO:** Distribute the pre-assessment to the participants.

**SAY:** We do not need your name, so you will need to come up with a 4-digit identifier to place at the top of your assessment. That will enable us to match your pre-assessment with the post-assessment you will complete later. Your identifier should be something you can easily recall at the end of the training when it is time for you to complete the post-assessment.

**DO:** Distribute the **Training Pre-Assessment** to participants. Give participants a few minutes to complete the assessment. Collect the completed assessments, and place them in a designated location.



## Lesson-at-a-Glance

Time Allowed	Topics	Activities	Materials
5 minutes	<ul style="list-style-type: none"> <li>• Introduction</li> </ul>	<ul style="list-style-type: none"> <li>• Review Key Terms</li> </ul>	<ul style="list-style-type: none"> <li>• Participant's Workbook</li> </ul>
<b>Objective: Apply the Principles of Adult Learning to training design and delivery.</b>			
25 minutes	<ul style="list-style-type: none"> <li>• Assessment</li> </ul>	<ul style="list-style-type: none"> <li>• Best/Worst</li> </ul>	<ul style="list-style-type: none"> <li>• Participant's Workbook</li> <li>• Chart paper</li> <li>• Markers</li> <li>• Pens or pencils</li> </ul>
<b>Objective: Identify the Five Moments of Learning Need.</b>			
25minutes	<ul style="list-style-type: none"> <li>• The Five Moments of Learning Need</li> <li>• Training and the Five Moments of Learning Need</li> </ul>	<ul style="list-style-type: none"> <li>• Moments of Learning Need Exercise</li> </ul>	<ul style="list-style-type: none"> <li>• Participant's Workbook</li> <li>• Chart paper</li> <li>• Sticky note pads</li> <li>• Markers</li> <li>• Pens or pencils</li> </ul>
<b>Objective: Describe cognitive overload and how to manage it.</b>			
15 minutes	<ul style="list-style-type: none"> <li>• Cognitive Overload</li> <li>• Chunking and Other Tips for Managing Cognitive Overload</li> </ul>	<ul style="list-style-type: none"> <li>• Memory</li> </ul>	<ul style="list-style-type: none"> <li>• Participant's Workbook</li> <li>• Sticky note pads</li> <li>• Pens or pencils</li> </ul>
<b>Objective: Apply "brain rules" to enhance adult learning.</b>			
20 minutes	<ul style="list-style-type: none"> <li>• Brain Rules</li> </ul>	<ul style="list-style-type: none"> <li>• Brain Rules Research</li> </ul>	<ul style="list-style-type: none"> <li>• Participant's Workbook</li> <li>• Chart paper</li> <li>• Markers</li> <li>• Pens or pencils</li> <li>• Phone/laptop</li> </ul>
<b>1 hour 30 minutes</b>			



## Lesson 1: How Adults Learn

**SHOW SLIDE:** *Lesson 1: How Adults Learn*

**SAY:** During this lesson, we will briefly discuss the popular principles of adult learning introduced by Malcolm Knowles. We will also discuss some topics you are probably less familiar with—the Five Moments of Learning Need, cognitive overload, and rules about the brain that are relevant to learning. This information will aid in ensuring those you train receive and retain the knowledge you hope to transfer. Before we begin, let's cover some key terms that you will hear throughout this lesson.

**SHOW SLIDE:** *Key Terms*

**DO:** Refer participants to the **Key Terms** handout located in the Participant's Workbook as you discuss the terms.

### Key Terms

- **Chunking** is grouping or breaking information into smaller units, which makes it easier to remember.
- **Cognitive overload** is based on a theory that suggests the brain is limited in the amount of information it can retain at once. So, if we are presented with too much information at one time, it decreases the likelihood of retaining the information.

**Objective: Apply the Principles of Adult Learning to training design and delivery.**

**SHOW SLIDE:** *Activity: Best/Worst Exercise*

**ASK:** Have you ever attended or facilitated a training where some participants openly complained, were not very engaged, or appeared disinterested? How about a training where participants seemed excited about the opportunity, were attentive, and initiated meaningful discussions?

**DO:** Allow the participants to respond to each question by a show of hands.

**ASK:** Have you ever thought about what makes a training good or bad?

**SAY:** Let's do a brief activity to help us brainstorm factors that can make or break a training.

**DO: Activity: Best/Worst Exercise**

## **Activity: Best/Worst Exercise**

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### **Materials:**

- 1 sheet of chart paper for each team
- Markers for each team

**Time:** 10 minutes

**Instructions:** Divide the class into teams of four or five participants and provide each team with a sheet of chart paper and a marker. Ask the teams to draw a line down the middle of the paper to make two columns. At the top of the left column, ask the teams to write *Best*. At the top of the right column, ask the teams to write *Worst*.

Instruct the teams to visualize the best and worst trainings they have attended. Tell them to think about all the things that made the best training good (e.g., engaging, hands-on, very organized) and the things that made the worst training not good (e.g., trainer read the slides, boring, too long). Give the teams 2 minutes to list the best and worst attributes in their respective columns on the sheet of chart paper. After the teams generate their lists, tell them to place stars by the top three things they think are most important. Then, allow the teams to share their three most important findings from their best and worst lists with the entire group. When sharing, also encourage teams to share any ideas that differ from what other teams have shared.

**SAY:** The activity we just completed is an example of one of the most effective ways adults learn—through storytelling and experiential lessons. It allows learners to connect relevant experiences to the learning process. Notice, all I asked each team to do was make two different lists. That was a simple, informal task. What happened is we all started sharing our stories and experiences with each other, and we probably heard and saw some things that we had not experienced or thought about before. Interestingly, it has been estimated that approximately 80% of learning on the job stems from interactions between learners and those around them (i.e., co-workers, managers, and subject matter experts). Bringing in past experiences and connecting them to our learning objectives is a key aspect of the adult learning process.

**ASK:** If everyone clearly knows what good training looks like and what bad training looks like, why is it that bad training still happens?

**FEEDBACK:** There are no right or wrong answers to the question. Bad training doesn't have to happen, and the remainder of this course will address many of the reasons why some trainings do not go well as others. The overall purpose of this course is to equip you with the knowledge and skills needed to become more effective trainers. We will begin with discussing some principles that inform us about how adults learn.

**SHOW SLIDE:** *Principles of Adult Learning*

**SAY:** Being physically present in a room does not mean individuals are mentally present, feel secure, or are eager to learn. It is our job as trainers to set the tone for the learning environment. One of the most important steps you can take to ensure your training is well designed, well delivered, and well received is to have an understanding of how adults learn.

More times than not, when you research adult learning or attend courses on the topic, the widely known principles you see listed on this slide are typically discussed. These principles were developed by educator and former director of the Adult Education Association, Malcolm Knowles. Since these principles are commonly covered, we will not spend much time on them today

**DO:** Refer participants to the **Principles of Adult Learning** handout. Using the discussion points listed below, briefly explain each of the adult learning principles.

- *Adults are internally motivated and self-directed.* That means they typically possess a great readiness to learn and have the need to be free to direct themselves. Adult learners also need to be involved in the learning process, and those who do take initiative in learning tend to learn more than those who do not. We should try to actively involve participants in the learning process and simply serve as facilitators guiding them through the process.
- *Adults bring life experiences and knowledge to the classroom.* They are a valuable learning resource because they typically have experience to draw from. Their experiences provide them with a solid foundation for learning new knowledge and skills. We should try to connect what we want them to learn with the knowledge and experience they already possess.

- *Adults are relevancy-oriented.* So, it is important for what they learn to apply to their job or other responsibilities to be of value to them. Some ways we can meet this learning need are to let adult learners know:
  - Why they need the information
  - How they will benefit from the information
  - How they can use the information in a real-life way
- *Adults are goal-oriented.* They usually know what they want to attain. Trainers must convey to participants how the training will help them reach their goals. This principle ties closely with the fact that we need to demonstrate how information is relevant.
- So, the overall goals and course objectives should be introduced early in the course to motivate learning.
- *Adults are practical and learn by doing.* They will focus on the aspects of a lesson that are most useful to them at work. Consequently, it is important to incorporate opportunities for adult learners to practice new knowledge and skills in a realistic setting. The ability to apply new knowledge and skills is a good way to measure if learning has occurred.

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## Principles of Adult Learning

As trainers, our job is to facilitate learning. In other words, it is our responsibility to do what we can to ensure participants learn what we want to them to know. Here are five evidence-based principles you should keep in mind when training adult learners.

- Adult learners are internally motivated and self-directed. They are typically motivated to learn if they can:
  - Have some degree of independence in the learning process
  - Make decisions about the content and the learning process
  - Contribute to the learning of their peers
- Adults bring life experiences and knowledge to the classroom. They are typically motivated to learn if it:
  - Involves sharing what they know
  - Builds on what they know
  - Validates their expertise
- Adults are relevancy-oriented. They must be able to see the personal benefit of what they are learning, and how it satisfies a need they have. They are motivated to learn if the learning:
  - Solves or avoids a problem for them
  - Provides an opportunity or increased status
  - Leads to professional or personal growth
- Adults are goal oriented. They are typically motivated to learn if:
  - The trainer conveys how the information can help them reach a specific goal
  - They can relate to the overall course goals and objectives
  - The information can help them in some way personally or professionally
- Adults are practical and learn by doing. They learn best when:
  - There is immediate application for the learning
  - They participate actively in the learning process
  - They can practice new skills or test new knowledge before leaving a training

**DO:** After explaining each of the principles, direct participants to the **Applying the Principles of Adult Learning** handout for a list of suggestions regarding ways to apply the principles in their own trainings. Explain that ICN has an online course, *Adult Learning*, that provides more in-depth information on these and other adult learning principles and theories, as well as how to apply them.

## Applying the Principles of Adult Learning

- Present new information in a way that relates to the adult learner's job or personal needs. If the learner does not see any connection, they will probably lose interest.
- Actively involve the learner in the learning process. Adults want to know that what they are learning is relevant to their personal and professional needs. Allow them to share in the responsibility of planning and developing learning goals and objectives.
- Use feedback and summarize the material often. Adult learners need feedback on how they are doing. Positive feedback can serve as reinforcement for learning.
- Adults have different learning styles. Some prefer to learn on their own, while others prefer small group work, lecture, demonstrations, or hands-on opportunities. Incorporate variety as much as possible, without sacrificing the relevance of the activities.
- Learning is a continuous process. Adult learners come with a wide range of previous experiences, knowledge, skills, and self-direction. Relate the training to the knowledge and experience of the learners.
- Follow the concept that people learn by doing. Keep them working through hands on experience whenever possible, especially using activities that parallel the work environment.
- Incorporate reinforcing activities to help learners transfer the knowledge and skills.
- Arrange for the learning to be self-directed and problem-centered.
- Mutual trust is important. Adult learners need the freedom of open expression and to know that expressing a difference will not have adverse consequences.
- Facilitate the learning process through inquiry and self-discovery. Provide learning opportunities for learners to discover the facts on their own.
- Use both extrinsic and intrinsic motivators.
- Allow adequate time for practice.
- Make the learning experience fun. When learning is fun, the learner will be more likely remember what they have learned.

**SAY:** As you can see, Knowles believed that adults cannot simply act as passive receivers of others' knowledge as children often do. Adults have different learning needs and must be actively involved in the learning process, which is how they learn best.

**Objective: Identify the Five Moments of Learning Need.**

**ASK:** While we are on the topic of learning needs, has anyone heard of the Five Moments of Learning Need?

**SHOW SLIDE: Five Moments of Learning Need**

**SAY:** While Knowles' principles give us insight into how adults learn, Bob Mosher and Conrad Gottfredson have provided us with guidance on when adults may need to learn. They refer to those instances as the Five Moments of Learning Need, which we should view as opportunities to improve performance and build upon learners' strengths while finetuning their weaknesses. Moments of learning need include when we are:

- Learning something for the first time
- Needing to learn more about a topic/skill
- Remembering and applying what we have learned
- Doing something that has changed
- Dealing with problems/things that have gone wrong

**SHOW SLIDE: Activity: Moments of Learning Need**

**SAY:** To help us put the Five Moments of Learning Need into perspective, I have a brief activity I want us to do.

**DO: Activity: Moments of Learning Need****Activity: Moments of Learning Need**

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**Materials:**

- Sheet of note pad paper or index card for each participant
- Pen or pencil for each participant

**Time:** 5 minutes

**Instructions:** Instruct participants to think of and list 1-2 things they have learned within the past six months. Then ask them to think about why they learned these things and write their responses on their sheet of note paper. Finally, ask them to think about how what they learned and why aligns with any of the moments of learning need. Tell them to write their responses on their sheet of note paper. Give participants a couple of minutes to complete the task. Then, ask them to share their responses with those at their table.

**ASK:** Did anyone discover that someone else learned something fun or interesting? How did your learning experiences align with one of the moments of learning need?

**SAY:** Now, I want you to consider the audience you are most likely to train (e.g., directors training managers, managers training cooks, sponsors training family child care providers). I want you to think about how the moments of learning need would be relevant to you as a trainer and your intended audience.

**DO:** Refer participants to **The Five Moments of Learning Need** worksheet. Instruct them to work together with participants at their table to write circumstances or situations that would warrant training, based on each of the moments of learning need discussed. Give participants 5 minutes to complete this task. Allow each table to share a couple of their ideas. Then, provide participants with suggestions for addressing each moment of learning need, using the **Addressing the Five Moments of Learning Need** handout as a guide.

**Instructor's Note:** Participants' training roles may vary. Some may need to train their own staff and others may plan to conduct training for an organization. Provide participants with a few relevant examples to help get their ideas flowing (e.g., If a school nutrition manager or director needs to plan and conduct an employee training on how to complete a transaction through the point of sale (POS) system, would the approach be different for a new employee who has never used the system before? Would the approach be different if there has been a recent change in the process? How do these situations relate to the moments of learning need?). The overall purpose of this information is to help participants identify specific instances when training may be warranted and strategies they can employ to address each moment of learning need.

## The Five Moments of Learning Need

Use the spaces below to describe circumstances/situations that may warrant training based on each of the moments of learning need.

**New:** to teach participants information and/or a skill they are learning for the first time

**More:** to teach participants more information about a particular topic/skill

**Apply:** to provide participants an opportunity to remember and apply what they have learned

**Change:** to teach participants about something that has changed

**Problem Solving:** to provide participants with answers/solutions to challenges on the job

## Addressing the Five Moments of Learning Need

### Learning Something for the First Time

- Develop lessons and supporting materials that effectively explain new information.
- Provide demonstrations.
- Design a handout that explains a new job-related task.
- Create an infographic or poster that provides step-by-step instruction for completing a new task.
- Facilitate discussion regarding why the new information or skill is relevant.

### Expanding What They Already Learned

- Determine current knowledge through activities, surveys, and pre-/post-assessments.
- Provide lists of additional resources that can be used to located more information on a given topic.
- Provide opportunities to learn from each other through group or partner activities.
- Design activities that build on prior knowledge and can be completed at home.

### Remembering and Applying Learned Concepts

- Create job aids.
- Provide opportunities to practice new skills.
- Create checklists.
- Suggest mentoring new staff or staff unable to attend training.

### When Change Occurs

- Design assessments to ensure participants understand and are up to date with changes that have occurred.
- Facilitate discussions so participants can learn from you and each other.
- Direct participants to where they can acquire the updated information.
- Develop an informational webinar.
- Let participants know how it benefits them.
- Allow someone to provide a testimonial.
- Attach rewards or incentives.

### When Things Don't Go According to Plan

- Develop a frequently asked questions handout.
- Develop how-to guides.
- Provide scenarios that require creative thinking and problem solving.
- Refer participants to the ICN help desk.

**Objective: Describe cognitive overload and how to manage it.**

**SHOW SLIDE: Cognitive Overload**

**SAY:** So far, we have discussed that for learning to take place, it is beneficial to consider how adults learn best (Principles of Adult Learning) and when adults commonly need to learn (5 Moments of Learning Need). As trainers, we should also remember that it is important for us to teach in a way that enables the learners' brains to make sense of the information we are providing. When someone is given too much information, it results in them being unable to process the information. As a result, they cannot retain what we want them to learn. That inability to retain information occurs because our brains can easily become overloaded. The technical term for this occurrence is cognitive overload.

**SHOW SLIDE: Chunking**

**ASK:** Did you know research suggests we can only handle five to nine pieces of information at once?

**SAY:** An easy way to remember that is seven plus or minus two, this is referred to as Miller's Law. Chunking is a term used to describe grouping information together to help learners retain it better. Chunking, or breaking information into pieces, helps the brain process the information easier. A classic example of chunking is your phone number. Another example is your social security number. You could even use chunking to remember a grocery list.

**Instructor's Note:** Miller's Law was derived from a study conducted by a psychologist, George A. Miller. In his article, he defined memory span based on the longest list of items (e.g., digits, letters, words) that a person could repeat back in the correct order, on 50% of trials, immediately after the slide. He found that the most common memory span of participants was seven items.

**SHOW SLIDE: Activity: Memory Exercise**

**SAY:** We are going to do an activity that demonstrates how this works. Many of you have probably played this game in the past, but let's try it again.

**DO: Activity: Memory Exercise****Activity: Memory Exercise**

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**Materials:**

- Sheet of note pad paper or index card for each participant
- Pen or pencil for each participant
- **Trial I** slides (Trial I, List the Letters You Remember, and Stop)
- **Trial II** slide (Trial II, List the Letters You Remember, and Stop)
- Timer (use phone or watch/clock with minute hand)

**Time:** 5 minutes

**Instructions:** Explain that you are going to display a slide with 15 letters on it (**SHOW SLIDE: Trial I**), and that you are going to leave the slide up for 15 seconds. During that time, participants are NOT allowed to write anything down. After you have shown the slide for 15 seconds, immediately advance to the next slide so that participants can no longer see the letters (**SHOW SLIDE: List the Letters You Remember**). Then, ask participants to list all the letters they can remember. Give them 30 seconds to complete the task, and after 30 seconds they must put their writing utensils down (**SHOW SLIDE: STOP**).

**Instructor's Note:** For this activity, use your phone or the minute hand on a watch or clock to determine when 15 and 30 seconds have passed. When you display the slide for 15 seconds, during Trial I, you can continue to talk as a distractor. This will further illustrate the concept of cognitive overload. Only do this during Trial I.

**DO:** To get participants moving, tell them to stand if they remembered at least 5 letters. Tell them to remain standing if they remembered at least seven. Tell those who remembered nine or more to remain standing.

**SAY:** Now, let's try this one more time to see how many items you can remember.

**DO:** Explain that you are going to display another slide with 15 letters on it (**SHOW SLIDE: Trial II**), and that you are going to leave this slide up for 15 seconds. During that time, participants are NOT allowed to write anything down. After you have shown the slide for 15 seconds, immediately advance to the next slide so that participants can no longer see the letters (**SHOW SLIDE: List the Letters You Remember**). Then, ask them to list as many of the 15 letters as they can remember. Give them 30 seconds to complete the task, and after 30 seconds they must put their writing utensils down (**SHOW SLIDE: STOP**).

**ASK:** Did you remember more this time? By a show of hands, who remembered more than five? More than seven? More than nine? Why do you think you remembered more?

**FEEDBACK:** Probably because I didn't say anything this time, and the letters were chunked.

**ASK:** Why do you think this mattered?

**FEEDBACK:** By organizing the information and grouping it into smaller chunks, the results changed—the brain was enabled to do its job. Point out the rule of seven plus or minus two again (i.e., people cannot process more than nine pieces of unconnected information). We have to present information in a way that allows learners to think, process, and remember it.

**SHOW SLIDE:** *Four Steps to Chunking*

**DO:** Refer participants to the **Four Steps to Chunking** handout in the Participant's Workbook for more details on how to chunk information.

## Four Steps of Chunking Information

### Step 1: Start broadly

First, identify the purpose of the training you want to provide. What is the overall goal of your training?

### Step 2: Break it down

Break broad amounts of information down into smaller related chunks, and those will become your lessons.

### Step 3: Organize content by looking for commonalities

Once you have established the lessons, organize the content so that you are presenting one chunk of related information at a time. You can do this by grouping related information together based on topics, concepts, skills, or learning objectives.

### Step 4: Consider retainability

During these steps, here are a couple of questions to ask yourself:

- Is all of the content needed? If the answer is no, get rid of it. Remember, keep it simple.
- Does each chunk of content relate to only one main topic? If the answer is no, take a step back and regroup.
- Will the chunk of content require learners to retain more than five to nine things at once in order to understand it? If the answer is yes, break it down again. The key is bite-sized pieces of information.

**ASK:** Do you have any other ideas about ways we can help people remember what they are learning? Any special techniques you have used in the past?

**Instructor's Note:** You can use a sheet of chart paper and create a "Technique Bank." Participants can insert their tips and techniques, written on sticky notes, in the bank so other participants can look back at them later. Utilize the bank throughout the training. Encourage participants to use their phones to take a photo of the bank for ideas to use after the training has concluded.

**DO:** Refer participants to the worksheet, **Tips for Preventing Cognitive Overload**. As a group, briefly discuss how these additional tips can aid trainers in preventing cognitive overload. There are blank spaces for participants to list other ideas that are discussed.

## Tips for Preventing Cognitive Overload

Below are examples of ways you can manage cognitive load. In the blank spaces, write ways you think you could manage cognitive load as a trainer.

- Keep information as simple as possible.
- Use a variety of instructional techniques (e.g., visual and auditory).
- Adapt training to participant's level of expertise.
- Provide examples, content summaries, checklists, key terms lists, etc.
- Ensure materials are well organized.
- Review materials prior to training to aid in clear, concise training delivery.
- Avoid providing unnecessary information.
- Limit environmental distractors.
- Use mnemonics and songs (e.g., HOMES for the 5 great lakes or the ABC song).
- Apply the Principles of Adult Learning during training design and delivery.
- Provide opportunities to apply knowledge and skills to real-world situations.
- Incorporate activities that allow movement.
- Provide information about additional resources.

**Objective: Apply “brain rules” to enhance adult learning.**

**SHOW SLIDE: Activity: Brain Rules Research**

**SAY:** We are going to end this lesson by covering a topic related to how adults learn.

John Medina outlines a dozen brain rules in his book, *Brain Rules*. You are probably wondering what brain rules are, well, they are facts scientists have proven about how our brains work (e.g., how we learn, why we forget, why it is so important to repeat new knowledge).

**DO:** Refer participants to **The Brain Rules** handout in their workbooks for a list of the rules.

**SAY:** Rather than I talk about all twelve, I'm going to ask you to do some research.

Remember how we discussed that it is important to provide opportunities for learners to discover facts on their own. This activity is an example of that.

**DO: Activity: Brain Rules Research****Activity: Brain Rules Research**

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**Materials:**

- Sheet of chart paper for each group
- Marker for each group
- Phone or laptop

**Time:** 25 minutes

**Instructions:** Have the class count off by six. Assign each of the six teams two of the Brain Rules, and give them a piece of chart paper and a marker. Instruct participants to visit the Brain Rules website, which is located on the slide. Each team should use their phones or laptops (if available) to read about their assigned Brain Rules. Invite participants to also visit other websites to see if they can find relevant information about their assigned rules.

Instruct participants to discuss their findings and list five main takeaway points for each assigned rule on the paper. Give participants 15 minutes to complete the task. Have each team elect a spokesperson to explain their Brain Rules and how they think they can be applied in planning for or conducting training.

**SAY:** During this lesson, we discussed the popular Principles of Adult Learning introduced by Malcolm Knowles. We also discussed some topics you might have been less familiar with—the Five Moments of Learning Need, cognitive overload, and rules about the brain that are relevant to learning.

**ASK:** What questions do you have about the content we covered during this lesson?

**DO:** Answer participants' questions before moving on to the next lesson.

## The Brain Rules



### survival

The human brain evolved, too.



### memory

Repeat to remember.



### exercise

Exercise boosts brain power.



### sensory integration

Stimulate more of the senses.



### sleep

Sleep well, think well.



### vision

Vision trumps all other senses.



### stress

Stressed brains don't learn the same way.



### music

Study or listen to boost cognition.



### wiring

Every brain is wired differently.



### gender

Male and female brains are different.



### attention

We don't pay attention to boring things.



### exploration

We are powerful and natural explorers.

Adapted from Medina, J. (2018). *About Brain Rules*. <http://www.brainrules.net/about-brain-rules>



## Lesson-at-a-Glance

Time Allowed	Topics	Activities	Materials
<b>Objective: Develop measurable learning objectives.</b>			
30 minutes	<ul style="list-style-type: none"> <li>• Learning Objectives</li> <li>• Benefits of Writing Objectives</li> <li>• How to Write Objectives</li> </ul>	<ul style="list-style-type: none"> <li>• Writing Objectives</li> </ul>	<ul style="list-style-type: none"> <li>• Participant's Workbook</li> <li>• Sticky note pad</li> <li>• Pens or pencils</li> </ul>
<b>Objective: Construct a content outline by utilizing the ROPES model.</b>			
30 minutes	<ul style="list-style-type: none"> <li>• Explanation of ROPES</li> <li>• Each Step in the Design Process Using ROPES</li> <li>• <i>(The next two objectives are included during the discussion of ROPES)</i></li> </ul>	<ul style="list-style-type: none"> <li>• Develop an outline using the ROPES</li> </ul>	<ul style="list-style-type: none"> <li>• Participant's Workbook</li> <li>• Chart paper</li> <li>• Sticky note pads</li> <li>• Markers</li> <li>• Pens or pencils</li> </ul>
<b>Objective: Identify a variety of methods for presenting content.</b>			
20 minutes	<ul style="list-style-type: none"> <li>• Choosing Methods</li> <li>• Types of Methods</li> </ul>	<ul style="list-style-type: none"> <li>• Training Modalities</li> </ul>	<ul style="list-style-type: none"> <li>• Participant's Workbook</li> <li>• Chart paper</li> <li>• Markers</li> </ul>
<b>Objective: Plan a variety of exercises to reinforce learning.</b>			
20 minutes	<ul style="list-style-type: none"> <li>• Choosing Activities to Engage Learners and Reinforce Concepts Taught</li> </ul>	<ul style="list-style-type: none"> <li>• Training Beats</li> </ul>	<ul style="list-style-type: none"> <li>• Participant's Workbook</li> <li>• Training Beats posters</li> <li>• Chart paper</li> <li>• Sticky note pads</li> <li>• Markers</li> <li>• Pens or pencils</li> </ul>
<b>1 hour 40 minutes</b>			



## Lesson 2: Developing Effective Training Techniques

**SHOW SLIDE:** Lesson 2: Developing Effective Training Techniques

**SAY:** The concept of continuous improvement is the foundation of training. In other words, we see the need for people to grow and improve, and we know training is a way to make that happen. When we provide training to our staff, we are sending the message that we value them and the job they do. Research has demonstrated not only does training increase worker productivity, but it boosts confidence and motivation to perform well. During this lesson, we will discuss some proven approaches you can utilize to ensure the trainings you provide are effective.

**Objective: Develop measurable learning objectives.**

**ASK:** Before you develop or provide a training, do you ever stop to think about what you expect your learners to be able to do, or do better, after the training?

How do we know that our participants have learned what we wanted them to learn? How do we know that we have been effective as trainers?

**SHOW SLIDE:** Objectives

**SAY:** We know these things by beginning with the end in mind and developing measurable learning objectives. Learning objectives are simply statements about what learners will do when we complete instruction. Specific, measurable learning objectives are important because they are a:

- Guide for our lessons (outlines and development), and
- Way of measuring learning and trainer success.

So, before we begin discussing how to develop an actual lesson, we first need to cover some information about writing learning objectives.

**SHOW SLIDE:** ASK

**ASK:** Did you know there is more than one type of learning?

**DO:** Refer participants to the **ASK** handout in the Participant's Workbook as you first explain how each letter aligns with the three learning domains. Then, you can also use the handout when you discuss use of action verbs to measure each domain.

**SAY:** Benjamin Bloom, an educational psychologist, and his colleagues categorized learning into three domains. The three domains are affective, psychomotor, and cognitive. Those terms are rather complex, so you will commonly see domains referred to as categories and those categories referred to as attitudes, skills, and knowledge versus affective, psychomotor, and cognitive.

**ASK:** Do you recall how we discussed the use of acronyms and mnemonics as a means of preventing cognitive overload?

**SAY:** Well, an easy way to remember these categories is by remembering the acronym ASK.

**Instructor's Note:** It may be beneficial to discuss that the terms education and training are often used interchangeably, but they are different. A greater emphasis is typically placed on the knowledge category in traditional education settings. Also, inform participants that Bloom's Taxonomy stems from work done by a group of educators in the 1940s. The intent was to develop a classification system for three domains of learning. The work that resulted in the cognitive domain (knowledge) was completed in 1956 and is referred to as *Bloom's Taxonomy of the Cognitive Domain*, which we most commonly see. So, while the knowledge domain is undoubtedly important and seemingly more popular to reference when discussing objectives, in the context of training, it is important to consider the attitudes and skills categories as well.

**A****Attitudes**

- This domain focuses on changing how a learner chooses to act.
- The action verbs associated with this domain allow us to measure whether learners do things such as comply, verify, and follow.

**S****Skills**

- This domain focuses on changing or improving tasks we want the learner to be able to perform.
- The action verbs associated with this domain allow us to measure the learner's ability to complete tasks such as prepare, develop, and calibrate.

**K****Knowledge**

- This domain focuses on what we want the learner to know.
- The action verbs associated with this domain allow us to measure the learner's knowledge through their ability to do things such as identify, explain, and list.

**SAY:** I want you to think of each of the learning categories as broad goals that align with your training topic (i.e., broader purpose/overall reason for providing the training). In other words, our trainings should impact learners' attitudes, teach or improve a particular skill, and/or increase knowledge in a specific area. Determining which learning category our training aligns with makes it much easier for us to write our objectives. Let me explain why.

Earlier, I mentioned that our objectives need to be measurable. In order to develop measurable learning objectives, we need to use action verbs—an action verb describes a physical or mental action. Those verbs are how we demonstrate changes in attitude, mastery of a skill, and/or specific knowledge, and there are specific verbs that align with each of the three learning categories. Turn to the **Sample Action Verbs** handout in your Participant's Workbook. There you will find sample lists of actions verbs for each category.

**DO:** Give participants a minute to look over the action verbs lists.

## Sample Action Verbs

The following lists are examples of action verbs that align with each of the three learning categories: attitudes, skills, and knowledge.

### Attitudes

<b>Accept</b>	<b>Adopt</b>	<b>Assess</b>
<b>Choose</b>	<b>Collaborate</b>	<b>Comply</b>
<b>Display</b>	<b>Evaluate</b>	<b>Follow</b>
<b>Influence</b>	<b>Initiate</b>	<b>Judge</b>
<b>Modify</b>	<b>Order</b>	<b>Organize</b>
<b>Participate</b>	<b>Propose</b>	<b>Relate</b>
<b>Respond</b>	<b>Share</b>	<b>Verify</b>

### Skills

<b>Adjust</b>	<b>Administer</b>	<b>Assemble</b>
<b>Build</b>	<b>Calibrate</b>	<b>Change</b>
<b>Demonstrate</b>	<b>Develop</b>	<b>Design</b>
<b>Execute</b>	<b>Form</b>	<b>Locate</b>
<b>Measure</b>	<b>Operate</b>	<b>Prepare</b>
<b>Produce</b>	<b>Record</b>	<b>Replace</b>
<b>Set</b>	<b>Serve</b>	<b>Tune</b>

### Knowledge

<b>Associate</b>	<b>Appraise</b>	<b>Compare</b>
<b>Compile</b>	<b>Cite</b>	<b>Describe</b>
<b>Define</b>	<b>Distinguish</b>	<b>Estimate</b>
<b>Examine</b>	<b>Explain</b>	<b>Identify</b>
<b>Interpret</b>	<b>Label</b>	<b>List</b>
<b>Match</b>	<b>Name</b>	<b>Recite</b>
<b>Specify</b>	<b>State</b>	<b>Write</b>

**SAY:** What you will notice about the verbs listed on the **Sample Action Verbs** handout, and any Bloom's Taxonomy chart you may see or choose to use, is that all of the words are measurable. Words you will not typically find on these lists include things such as *know* and *understand*.

**ASK:** How do we determine what learners know? How do we measure understanding?

**DO:** Allow the participants to respond.

**FEEDBACK:** Those are very broad terms. We want to use more specific words that are observable and identify measurable actions. We can determine what learners know and measure understanding when they can correctly list, recite, apply, demonstrate, etc. These words are more specific.

**ASK:** What questions do you have about what I've covered so far?

**DO:** Answer any questions the participants may have.

**SHOW SLIDE:** *Writing the Objectives*

**SAY:** When it comes to applying what we just discussed, there are several approaches. Some of those approaches make writing objectives much more complex than it has to be. There are essentially three simple components we should keep in mind when writing objectives—who, will, and what. These three things will enable us to make sure our objectives are clear, measurable, and relevant

**SHOW SLIDE:** *Ask Yourself*

**SAY:** Let me give you an example based on what we have discussed. Let's pretend we just got a new dishwasher in our school kitchen. You have been taught by the sales representative how to use the dishwasher, but the other staff needs to know how to use it too. It is up to you to train them.

**ASK:** Which learning need does this align with? What learning category does it align with?

**FEEDBACK:** That's correct! In this instance, we are teaching something new. A new skill needs to be taught because we have a new dishwasher. Given this circumstance, the who is staff, will is operate, and what is the new dishwasher.

**SHOW SLIDE:** *The Learning Objective*

**SAY:** I mentioned earlier that a learning objective is a statement that describes what we want learners to be able to do once they complete the training. So, we should always begin with a stem such as, "By the end of this training, participants will" or "Upon completion of this lesson, participants will." By using our scenario to answer who, will, and what, we can formulate a measurable learning objective.

**DO:** Refer participants to the **Writing Learning Objectives** handout in the Participant's Workbook and inform them that the handout summarizes the key points discussed.

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## Writing Learning Objectives

### What are learning objectives?

Learning objectives are clear, measurable statements of what learners can do at the end of a training as a result of the activities, teaching, and learning that takes place. The objectives that you write can be based on three learning categories: attitudes, skills, and/or knowledge.

### Tips for Writing Objectives (Who, will, and what?)

- Align objectives with participants' education levels, abilities, experiences, and overall learning needs. Your objectives should indicate who will do what.
- To address the who, precede your objectives with a stem similar to the following: "By the end of the training, participants ..." or "Upon completion of this lesson, staff ..."
- Include two other basic components in the statement—the will do (an action verb) and specify the what (attitude, skills, content knowledge you expect the learner to acquire).
  - ♦ The action verb should describe an observable/measurable action or behavior (e.g., will identify).
  - ♦ The *what* generally describes the attitude, skill, or knowledge learners are expected to acquire (e.g., strategies for reducing cognitive overload).

**Objective Example:** By the end of this training, participants will be able to identify strategies for reducing cognitive overload.

- Use clear and concise words (avoid the use of verbs that are open to many interpretations and refer to the sample lists that are available for each category of learning; many lists are available online).
  - ♦ Words Open to Interpretation
    - To know
    - To understand
    - To appreciate
    - To learn
    - To enjoy
    - To believe
  - ♦ Words Less Open Interpretation
    - To write
    - To compare
    - To identify
    - To sort
    - To solve

**SHOW SLIDE:** Examples

**SAY:** Before I give you a chance to practice, I am going to provide you another example of learning objectives using the topic of handwashing and each of the learning categories: attitudes, skills, and knowledge.

**Instructor's Note:** During the proceeding discussion of objective examples, emphasize the use of a stem to introduce who, will, and what. Allow participants to give examples and provide confirming or corrective guidance as needed.

**SAY:** If we were considering the attitudes category, we may decide that we expect participants to comply with the handwashing requirements that are listed in our local food code.

**ASK:** Looking back at our sample action verbs for the attitudes category, can you think of another learning objective we could have in relation to handwashing?

**DO:** Thank participants for their responses and provide confirming or corrective feedback.

**SAY:** With the same handwashing training, using the skills domain, we may expect the participants to be able to demonstrate thorough handwashing using the five parts of a properly stocked handwashing station

**ASK:** Looking back at our sample action verbs for the skills category, can you think of another learning objective based on what we might want staff to do in relation to handwashing?

**DO:** Thank participants for their responses and provide confirming or corrective feedback.

**SAY:** If we were training an employee on proper handwashing, using the knowledge domain, we may expect the learner to be able to list times when hands should be washed.

**ASK:** Looking back at our sample action verbs for the knowledge category, can you think of another learning objective based on what we might want staff to know in relation to handwashing?

**DO:** Thank participants for their responses and provide confirming or corrective feedback.

**SHOW SLIDE: Activity: Writing Objectives**

**SAY:** Now, to make sure we all get the hang of writing objectives, let's practice writing an objective based on the knowledge category in smaller groups.

**DO: Activity: Writing Objectives****Activity: Writing Objectives**

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**Materials:**

- **Knowledge Category** handout
- Sheet of note pad paper or index card for each group
- Pen/pencil

**Time:** 5 minutes

**Instructions:** Invite participants to work with those at their table to develop one knowledge-based objective. Tell participants the objective can be on a topic of choice, and they may reference the **Knowledge Category** handout for guidance.

Give participants a couple of minutes to complete the task. Allow a few groups to share their objective. As a class, provide corrective feedback if needed.

## Knowledge Category

Level and Explanation (from least to most complex)	Sample Verbs	Objective Example
<p style="text-align: center;"><b>Knowledge</b> recall facts and basic concepts taught</p>	<p style="text-align: center;">define, describe, identify, label, list, match, name, outline, recall, recognize, reproduce, select, state</p>	<p>After completing this training, participants will <u>define</u> the term mise en place.</p>
<p style="text-align: center;"><b>Comprehension</b> demonstrate an understanding of what was taught</p>	<p style="text-align: center;">classify, describe, discuss, distinguish, estimate, explain, extend, give examples, identify, indicate, paraphrase, recognize, rewrite, summarize, translate</p>	<p>After completing this training, participants will <u>explain</u> the purpose of honing a knife.</p>
<p style="text-align: center;"><b>Application</b> use information taught in actual situations</p>	<p style="text-align: center;">apply, demonstrate, employ, illustrate, interpret, manipulate, modify, operate, produce, relate, show, solve, use, write</p>	<p>After completing this training, participants will <u>demonstrate</u> the proper steps for calibrating a thermometer.</p>
<p style="text-align: center;"><b>Analysis</b> break down ideas or objects into simpler parts and find evidence to support generalizations</p>	<p style="text-align: center;">breakdown, calculate, categorize, compare, contrast, differentiate, discriminate, distinguish, examine, select, test</p>	<p>After completing this training, participants will <u>calculate</u> recipe costs.</p>
<p style="text-align: center;"><b>Synthesis</b> compile component ideas into a new whole or propose alternative solutions</p>	<p style="text-align: center;">arrange, combine, compose, construct, create, design, formulate, generate, plan, relate, set up, synthesize</p>	<p>After completing this training, participants will <u>compose</u> a measurable learning objective.</p>
<p style="text-align: center;"><b>Evaluate</b> make and defend judgements based on internal evidence or external criteria</p>	<p style="text-align: center;">appraise, argue, assess, attach, choose, compare, conclude, contrast, defend, estimate, evaluate, judge, justify, interpret, rate</p>	<p>After completing this training, participants will <u>interpret</u> the current meal pattern requirements.</p>

**Objective: Construct a content outline utilizing the ROPES model.**

**SAY:** Now that we have discussed beginning with the end in mind by writing measurable learning objectives, we are going to discuss a model that can aid us in actually developing training programs.

**SHOW SLIDE:** *ROPES Model*

**ASK:** By show of hands, how many of you are familiar with the ROPES model?

**SAY:** ROPES is the acronym for a sequential strategy that is very helpful for organizing content in a manner that allows us to enhance learning outcomes. We will review each step, and then we will practice by designing a training outline on a topic of your choice.

**DO:** Refer participants to the **ROPES** handout in the Participant's Workbook; it can be referred to as you advance through each step. Also, direct participants' attention to the **Sample ROPES Lesson Plan** and the **ROPES Lesson Plan Template** in the Participant's Workbook. Explain to participants that as you progress through the discussion of each step in the ROPES model, they will work with individuals seated at their table to complete the corresponding step on their blank templates. So, give them a minute to brainstorm and come up with a training topic of their choice (for their group). Tell them to consider the type of trainings they currently provide, have already planned to provide, or would like to provide—they should choose a topic related to an area they are mutually interested in building on for the remainder of the lesson.

## ROPES

### **R – Relate and Review**

The purpose of this step is to increase learners' readiness to receive the material in the upcoming lesson.

- Why is this important?
- How does this relate to my job?

### **O – Overview**

The purpose of this step is establish our expectations.

- Provide overview
- Develop learning objectives
- How will compliance be measured?

### **P – Presentation**

The purpose of this step is to determine the method we will employ to present the content of our training.

- Videos
- Lecture-discussion
- Small group work

### **E – Exercise and Evaluate**

The purpose of this step is to identify activities for learners to apply what they've learned.

- Skill practice
- Games
- Skits

### **S – Summary**

The purpose of this step is to wrap up the training.

- Lesson recap
- Questions and answers
- Next steps

## Sample ROPES Lesson Plan

<b>Lesson Title: Handwashing</b>	
ROPES	Content Outline
<b>R – Relate and Review</b>	<b>Demonstrate the need for this information/skill, gain interest, and ready the learner.</b>
<p><b>“What’s in it for me?”</b></p> <p>Handwashing is one of the best ways to prevent illness from the common cold and flu and by preventing foodborne illness. If we are ill and cannot work, that could mean we lose a day’s pay. If we contaminate our food, it may mean many students could become ill or even die. Handwashing is a great way for each of us to stay healthy and prepare and serve safe foods to our students.</p>	
<b>O – Overview</b>	<b>Summarize key content/give an overview of what will be taught, as well as explain what we expect (i.e., learning objectives).</b>
<p><b>“Establishing expectations”</b></p> <p>Because handwashing is such an important part of our daily job, and affects our personal health and students’ health, we are going to discuss information you need to know to ensure you are following proper handwashing procedures. We will be reinforcing this expectation by adding a section on correct hygiene to our employee performance appraisals. We will also be introducing a monthly employee incentive to reward and recognize employee “best practices” for those who promote and comply with our personal hygiene policies.</p> <p>At the end of this training, you will:</p> <ol style="list-style-type: none"> <li>1. <u>Adopt</u> thorough and frequent handwashing practices, consistent with posted reminders and facility policies. (attitude)</li> <li>2. <u>Demonstrate</u> thorough handwashing using the five items at a properly stocked handwashing station. (skill)</li> <li>3. <u>Describe</u> how hands should be washed. (knowledge)</li> </ol>	
<b>P – Presentation</b>	<b>Ensure all learning objectives are achieved, we need to list and describe the method(s) that will be used to achieve each outcome. Remember, there are many ways we can teach, not just through lecturing.</b>
<ol style="list-style-type: none"> <li>1. <u>Adopt</u> thorough and frequent handwashing practices, consistent with posted reminders and facility policies. (attitude)</li> </ol> <p>Lecture – Trainer will review the posted signage that is in the kitchen, locker rooms, and especially over handwashing sinks. Trainer will explain the new performance appraisal criteria for personal hygiene and how this will be observed and measured throughout the performance year. Trainer will also review the new incentive program for employee “best practices.”</p> <ol style="list-style-type: none"> <li>2. <u>Demonstrate</u> thorough handwashing using the five items at a properly stocked handwashing station. (skill)</li> </ol> <p>Demonstration – Participants will be asked to physically demonstrate how hands should be washed.</p>	

<p>3. <u>Describe</u> how hands should be washed. (knowledge)</p> <p>Video – Participants will view a short video called “Wash Your Hands.”</p>	
<p><b>E – Exercise and Evaluate</b></p>	<p><b>Describe action-oriented, hands-on, learner-focused activities for each learning objective. Also, how will we measure success?</b></p>
<p>1. <u>Adopt</u> thorough and frequent handwashing practices, consistent with posted reminders and facility policies. (attitude)</p> <p>Role playing activity with scenarios (e.g., What would you do?) – Teams will be formed and each will have a different scenario related to poor personal hygiene and handwashing. Teams will explain how peers should respond to co-workers in the scenarios.</p> <p><b>Success measure:</b> During the role-playing activity, the trainer will evaluate the appropriateness of responses and provide confirming or corrective feedback. There will also be ongoing compliance monitoring, yearly performance reviews, and re-training as needed.</p>	
<p>2. <u>Demonstrate</u> thorough handwashing using the five items at a properly stocked handwashing station. (skill)</p> <p>Teams will participate in a “GloGerm®/Glitterbug®” competition. Each team will select a representative. Representatives apply GloGerm®/Glitterbug® to their hands, then wash their hands using the correct technique. After handwashing, teams use a black light to identify any missed areas on the representatives’ hands.</p> <p><b>Success measure:</b> The trainer will observe representatives washing their hands. Afterwards, the trainer will provide confirming and/or corrective feedback regarding the steps each representative took to wash hands.</p>	
<p>3. <u>Describe</u> how hands should be washed. (knowledge)</p> <p>After watching the “Wash Your Hands” video, participants will complete a video viewing guide about the proper steps and tools needed for thorough handwashing. The trainer will debrief using a question and answer approach.</p> <p><b>Success measure:</b> Each attendee will correctly complete the video viewing guide and provide correct responses during the debrief.</p>	
<p><b>S – Summary</b></p>	<p>- Lesson recap - Questions and answers - Trainer assessment/evaluation</p>
<p>Trainer will highlight key points covered, answer any questions, and administer a quiz. It will be either a pen/paper quiz, via an online tool (e.g., SurveyMonkey®), or an interactive tool (e.g., Kahoot®). Participants will also evaluate the presentation and the trainer.</p>	

## ROPES Lesson Plan Template

<b>Lesson Title:</b>	
ROPES Outline	Content Outline
<b>R – Relate and Review</b>	<b>Demonstrate the need for this information/skill, gain interest, and ready the learner.</b>
<i>“What’s in it for me?”</i>	
<b>O – Overview</b>	<b>Summarize key content/give on overview of what will be taught, and explain what we expect participants to do (i.e., learning objectives).</b>
<i>Establishing expectations”</i>	

<p><b>P – Presentation</b></p>	<p>Ensure all learning objectives are achieved. We need to list and describe the method(s) that will be used to achieve each outcome. Remember, there are many ways we can teach, not just through lecturing.</p>
Empty space for content	
<p><b>E – Exercise and Evaluate</b></p>	<p>Describe action-oriented, hands-on, learner-focused activities for each learning objective. Also, how will we measure success?</p>
Empty space for content	
<p><b>S – Summary</b></p>	<ul style="list-style-type: none"> <li>- Lesson recap</li> <li>- Questions and answers</li> <li>- Trainer assessment/evaluation</li> </ul>
Empty space for content	

**SHOW SLIDE: R – Relate and Review**

**SAY:** Let's discuss each step in more detail.

*R* stands for relate and review. During this step of the development process, the primary focus is gaining learners' attention. If you recall, this aligns with one of the Principles of Adult Learning that was discussed in Lesson 1—adults are relevancy-oriented. Learning has to be applicable to our job or other responsibilities to be of value to us. This is also consistent with findings from a study conducted by Dr. Donna Beegle. She concluded that staff learn better and retain more information when we make training content significant and meaningful to them in some way.

**ASK:** Can you think of ways we could gain learners' attention and show that the content is meaningful?

**FEEDBACK:**

- Relating it to current events (e.g., recent outbreak of norovirus reported on the news)
- Relating it to their personal emotions and prior knowledge (e.g., getting sick because we failed to wash our hands)
- Using an interesting image, object, quote, etc. to grab attention
- Letting them know how it relates to their job or life (i.e., WIIFM or "What's in it for me?")
  - ◆ It will make my job easier, simpler, quicker, etc.
  - ◆ It is useful to me personally (to not miss work and paychecks).
  - ◆ It will help me advance in my career.

**SHOW SLIDE: Activity: Hook the Learner**

**DO: Activity: Hook the Learner**

## Activity: Hook the Learner

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### Materials:

- **Sample ROPES Lesson Plan** (used the remainder of the lesson)
- **ROPES Lesson Plan Template** (used the remainder of the lesson)
- Pen/pencil for each participant

**Time:** 5 minutes

**Instructions:** Ask the groups to think about how their chosen training topic will be meaningful/useful to their staff/participants. Then, instruct them to use those thoughts to complete the R – Relate and Review section of the ROPES template. Tell them to refer to the sample lesson plan as needed. After completing the exercise, ask for a couple of volunteers to share their group's response. Provide confirming or corrective feedback.

**Instructor's Note:** If participants need more space than the template provides, a blank page was added to the Participant's Workbook for additional notes. Depending on the needs of your audience, you may also choose to discuss each step (as you cover it) on the **Sample ROPES Lesson Plan** before the groups attempt to complete the corresponding step on the **ROPES Lesson Plan Template**. Some groups of participants may need less guidance—in those instances, you may instruct them to refer to the sample lesson plan as needed.

### SHOW SLIDE: O – Overview

**SAY:** O stands for overview. During this step of the process, we establish our expectations. This is where we provide a short overview of what the training will entail, and what we expect from our staff at the completion of the training. This should also include our learning objectives also. Remember, we want to begin our development with the end result in mind. Lastly, during this step, it would also be appropriate to explain how staff compliance will be measured in the future:

Will performance appraisals reflect new expectations?

Will there be negative consequences for non-compliance (e.g., re-training)?

### SHOW SLIDE: Activity: Set the Tone

### DO: Activity: Set the Tone

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## Activity: Set the Tone

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**Materials:**

- **Sample Action Verbs** and **Knowledge Category** handouts
- Pen/pencil for each participant

**Time:** 10 minutes

**Instructions:** Ask the groups to think about what they expect their staff/participants to be able to do after they complete the training. Then, instruct them to use those thoughts to complete the *Overview* section of the ROPES template. This step includes writing relevant learning objectives, as well as explaining any performance expectations. Instruct participants to refer back to the **Sample Action Verbs** and **Knowledge Category** handouts for guidance on writing their learning objectives. After completing the exercise, ask for a couple of volunteers to share their group's response. Provide confirming or corrective feedback as needed.

**Instructor's Note:** Objectives are listed based on the ASK acronym that was discussed earlier. It may be relevant to mention to participants it would be more appropriate to describe how to wash hands, before having participants demonstrate proper handwashing, and we would ultimately want participants to adopt thorough and frequent handwashing practices.

**Objective: Identify a variety of methods for presenting content.**

**SHOW SLIDE: P – Presentation**

**SAY:** Now, let's move on to the next step in the ROPES model. P stands for presentation.

By the time we reach this step in the development process, we have established the importance of the training, as well as what is expected. Now is the time we should consider the methods we will use to present the content of our training. The good news is, there are many ways to teach a topic. However, we must keep in mind some individuals prefer lectures, while others may prefer demonstrations, hands-on training, etc. Using a variety of methods increases the likelihood of everyone having a positive learning experience. Another important fact to keep in mind is that our methods for delivering content need to align with meeting our objectives. Let's do an activity that will allow us to explore our options for delivering content.

**SHOW SLIDE:** *Activity: Training Methods***DO:** Activity: Training Methods**Activity: Training Methods**

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**Materials:**

- **Sample Training Methods, Training Factors to Consider, and Tips for Selecting Methods** handouts
- Sheet of chart paper for each group
- Different color marker for each group

**Time:** 15 minutes

**Instructions:** Depending on the size of the class, ask participants to count off in groups of 4–5. Ask the groups to think about how their staff/participants like to learn, as well as how they like to teach. Give groups 2–3 minutes to list all the training methods they can think of on their chart paper. Then, have each group swap their sheet of chart paper with another group, review the other group's list, and add any methods they can think of that other group is missing. After a couple of minutes, have each group describe two methods they listed. When the groups are sharing their ideas, encourage them to share methods that the other group has not mentioned.

**FEEDBACK:** Potential responses include lecture, demonstration, online courses, shadowing, guided discussion, learner-led discussion, etc.

**DO:** Refer participants to the **Sample Training Methods** handout in the Participant's Workbook. The handout provides participants with a variety of methods for presenting content to learners. Discuss the pros and cons of a few of the most popular training methods.

**Instructor's Note:** Mention that this is not an all-inclusive list. Also note that some of the methods listed are more conducive to delivering content, while others are more appropriate for reinforcing the concepts that are taught. Tie the latter to the next step in the process, *Exercise*.

**SAY:** There are also a few other factors to consider when deciding on the appropriate training methods.

**DO:** Refer participants to the **Training Factors to Consider** handout in the Participant's Workbook. Briefly discuss how each of the factors listed also each has impact on the method we choose to deliver information to learners. Afterward, tell participants to refer to the **Tips for Selecting Methods** handout for further considerations.

Now, instruct the groups to complete the *Presentation* section of the ROPES template. They should list a method for teaching the content related to each learning objective they listed. After completing the exercise, ask for a couple of volunteers to share their group's responses. Provide confirming or corrective feedback as needed.



## Sample Training Methods

Method	Focus	Characteristics
<b>Appraisals/Inventories</b>	Assessment of attitudes, behaviors, interests, needs, and skills	Provides quick overview and opportunity for on the spot assessment
<b>Audiovisuals</b>	Slides, posters, infographics, books, videos, etc.	Can work for multiple intelligences
<b>Brainstorming</b>	Group participation and quick generation of ideas	Requires total involvement
<b>Case Studies</b>	Review and critique true events	Promotes analytical thinking
<b>Computer-Based</b>	Internet-based instruction and/or assignments, discussion boards, chat rooms, etc.	May require training, can work for multiple intelligences
<b>Critical Incidents</b>	Similar to case studies, but without an ending; can be made up	Promotes critical thinking and problem-solving skills
<b>Debates</b>	Explore both sides of an issue	Trainer needs strong facilitation skills and confidence in handling various personalities
<b>Demonstrations</b>	Provide visual examples of performing a task or skill	Good for visual learners and aids in skill development
<b>Fishbowls</b>	Small inner circle discusses topic and outer circle can critique	An alternative for debates
<b>Games</b>	Model after popular board, card, or television game; be creative and make your own	Fun way to review new information and keeps learners engaged
<b>Large Group Discussion</b>	Follow up after or as part of lecture; can be structured or unstructured	Allows learners to share thoughts/ideas and provides an opportunity to assess learning
<b>Lecture</b>	Presenting information	One-way communication and ideal for verbal learners
<b>Problem-Solving</b>	Focuses on dilemmas and issues that may present on the job	Aids in improving problem-solving skills

<b>Role Playing/Skits</b>	Participants acting out scenarios; can be structured or partially structured	Requires volunteers
<b>Skill Practice</b>	Typically serves as a follow-up to reinforce learning	Requires observation and feedback; can work well by pairing or grouping learners
<b>Small Group Discussion</b>	Can occur before or after lecture as a follow-up	Need to provide clear directions and move around to keep groups focused
<b>Values Clarification</b>	Learners choose sides or rank priorities	Typically situational and helps clarify different issues or dilemmas

## Training Factors to Consider

Prior to making decisions about your training, ask yourself these questions:

### Why are you developing the training?

- Teach new skills
- Introduce new techniques for old skills
- Provide opportunities to apply knowledge
- Resolve a problem
- Address something that has changed

*\*Think about the Five Moments of Training Need*

### Who are you training?

- New employees
- Seasoned employees
- Management

*\*Consider education level and baseline knowledge of the topic*

### What resources and materials do you have available? What will you need?

### How much time do you have for the training?

- One time versus ongoing
- Minutes versus hours
- Days versus weeks

### How many participants will be present?

## Tips for Selecting Methods

- Set learning objectives and choose methods based on the content related to meeting the objectives.
- Gain a clear understanding of learners' baseline knowledge.
- Choose methods appropriate to the audience (e.g., age, culture, preferred learning style).
- Use a variety of methods to meet the needs of diverse groups of learners.
- Methods should align with your own expertise and personality.
- You should not overuse of any one method.
- Be mindful of the audience's expectations.
- If possible, involve participants in the method selection process.
- Sequence methods so that learning is maximized (e.g., present content before expecting participants to do a problem-solving activity or complete a case study).
- Use time wisely. Choose methods that will allow you to successfully meet your learning objectives within the allotted timeframe.
- Ensure you have the budget and/or materials necessary to train using the chosen methods.
- Choose alternative methods in case things do not go as planned.

**Objective: Plan a variety of exercises to reinforce learning.**

### SHOW SLIDE: *E – Exercise and Evaluate*

**SAY:** *E* stands for exercise. Learner-focused activities and exercises are an important part of our training delivery. We provide these:

- As a warm-up/ice breaker to get learners talking or woken up
- To allow learners to practice new skills/demonstrate achievement of learning objectives
- To keep the audience's attention, get blood flowing, or engage in movement
- For self-directed learning
- To assess learning throughout the training

It is important to remember we do not do activities and exercises just for the sake of doing them. They should be done for a purpose and support our learning objectives.

SHOW SLIDE: Activity: Training Beats

DO: Activity: Training Beats

## Activity: Training Beats

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### Materials:

- **Training Beats** handout
- **Training Beats** posters
- Sticky notes for each participant
- Pen or pencil for each participant

**Time:** 15 minutes

**Instructions:** Post the **Training Beats** posters around the room. Review the **Training Beats** handout with participants. Then, ask participants to write an activity-based method they like to, or want to, use on a sticky note. Ask participants to walk to the appropriate poster and stick their note on it. The instructor should visit each poster and share good examples. Finally, let the groups complete the *Exercise* section of their ROPES template by identifying activities to reinforce each learning objective. Also, invite groups to add ideas regarding how they will measure success. Afterward, ask a couple of volunteers to share their group's responses. Provide confirming or corrective feedback as needed.

## Training Beats

**Movement beats sitting.** Any kind of motion increases oxygen to the brain, which boosts brain power and memory. In this class, we have used standing instead of sitting for several activities already. Include short, topic-related activities that get participants out of their chairs and doing something.

**Writing beats reading.** Writing is multi-sensory, in that it is kinesthetic, visual-spatial, and tactile. Learners cognitively process information a second time when they write it after they hear it. This could include a fill-in-the-blank handout, a case study, and buzz-groups writing on chart paper, as we have done today.

**Talking beats listening.** When talking, learners process the information three times: first, by listening to it; second, by thinking about it; and third, by restating it using their own words. We have used this in several of our activities when your team provides feedback from your group activities.

**Images beat words.** We think in pictures, not words. Add images, even simple ones like photos, stories, and metaphors. It is also a good idea to use demonstrations so staff can “see” a process or desired result.

**Shorter beats longer.** Learners tend to lose interest after 8 minutes of lecture. The human brain learns best when content is divided into smaller “chunks” or segments of information. Break up lecture with other modes of training to keep interest and involvement high.

**Different beats same.** The brain will eventually ignore anything that is routine, repetitive, predictable, or boring. Break away from predictable, lecture-based presentations and vary the modes of instruction.

**SHOW SLIDE: S – Summary**

**SAY:** This brings us to the final step in the process. S stands for summary. Many of you have probably heard the saying, “Tell them what you’re going to tell them, tell them, and then tell them what you told them.” A good trainer always repeats what has been said, so it is during this summary phase that you should plan to tell them what you told them. Highlighting the main points covered in a training, at the end of the training, helps participants retain the information they were taught. It is also a good idea to mention what will be happening next (e.g., a quiz, evaluation, follow-up work, or plans for the next lesson in a series).

**DO:** Instruct participants to write a couple of statements summarizing the training information they plan to provide.

**SAY:** You should always ask participants if they have any questions. In your workbook you will find a handout, **Tips for Answering Questions**, that provides you with useful tips for answering questions throughout your training.

### **Tips for Answering Questions**

- Anticipate participants’ questions and consider potential responses.
- Inform participants of expectations surrounding questions early in the training.
- Paraphrase and/or repeat questions to ensure understanding.
- Ask for clarification, if needed.
- It is perfectly okay to respond with, “I don’t know, but I’ll find out.”
- Redirect appropriate questions to the group or encourage responses from others.
- If the question isn’t relevant put it in a “bike rack” or save it for the break.
- All questions are good questions—treat them as such.
- Avoid showing emotions to argumentative questioners.
- Include the entire audience in your response through body positioning and eye contact.

**SHOW SLIDE: Don't Forget!**

**SAY:** As trainers, we may think we have done an outstanding job at meeting learners' needs, but do not forget—a training is only as good as participants perceive it to be. So, it is a good idea to collect feedback by developing an evaluation form that you administer at the conclusion of your training. Taking this extra step will allow you to demonstrate to key stakeholders that your trainings are meaningful and effective. It will also assist you in assessing what worked and what did not work in your training. You can then build upon what worked and modify the aspects that did not go very well. However, if you are conducting the training for another organization, a more formal trainer evaluation format may be necessary or provided.

**SHOW SLIDE: Activity: Post-Training Evaluation**

**SAY:** To wrap up this lesson, we will conclude with a final activity that will aid you in developing effective training evaluations.

**DO: Activity: Post-Training Evaluation****Activity: Training Evaluation**

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**Materials:**

- Sheet of chart paper
- Marker

**Time:** 5 minutes

**Instructions:** Ask participants to brainstorm some items they could include on a training evaluation. Using the chart paper, you be the recorder. Invite participants to record any particularly interesting responses on their **Questions for Training Evaluations** worksheet. Refer participants to the **Sample Evaluation** handout for additional examples.

## Questions for Training Evaluations

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## Sample Evaluation Items

### Statements – Likert Scale:

- The training objectives were met.
- The content was organized and easy to follow.
- The handouts were helpful.
- The videos for this training are a useful way to reinforce the skills that were taught.
- The training held my attention.
- There were enough opportunities for me to actively participate.
- The time allotted for this training was sufficient/appropriate.
- I will apply the knowledge and skills I gained during this training at my job.
- I would be interested in attending a more advanced version of the training.
- Overall, the training met my expectations.

### Open-Ended Questions:

- Are there any additional topics you think should be included in this training?
- Are there any topics that you think should be excluded from this training?
- What did you like most about this training?
- How could we improve this training?
- Please share other comments or expand on previous responses here:

\*You may also choose to create multiple choice or other questions that are more specific to the topic you covered.

## Sample Evaluation

**Please rate each statement according to the following scale:**

5 – Strongly agree

4 – Agree

3 – Neutral

2 – Disagree

1 – Strongly Disagree

\_\_\_\_\_ The training met my expectations.

\_\_\_\_\_ The training was well organized.

\_\_\_\_\_ The training was presented at a level that met my needs.

\_\_\_\_\_ The handouts provided will be useful beyond this training.

\_\_\_\_\_ The activities included were relevant and helped me understand the topic.

\_\_\_\_\_ The trainer provided clear instructions for completing tasks.

\_\_\_\_\_ There were enough opportunities for me to ask questions.

**Please provide feedback on the following items:**

Describe what information or learning experiences that were most valuable to you.

Describe what information or learning experiences that were least valuable to you.

What suggestions do you have for improving this training?

**ASK:** What questions do you have about the content covered in this lesson?

**DO:** Answer participants' questions before moving on to the next lesson.

**SAY:** Congratulations, class! You have just written a learner-focused, activity-based training. While this may initially seem like a tedious process, it is the necessary "sweat equity" that we must invest to have measurable and memorable training outcomes.

## Lesson-at-a-Glance

Time Allowed	Topics	Activities	Materials
<b>Objective: Create and act upon a preparation checklist.</b>			
30 minutes	<ul style="list-style-type: none"> <li>• Identifying the Appropriate Times for Various Tasks in the Training Preparation Process</li> <li>• Preparation Checklists</li> </ul>	<ul style="list-style-type: none"> <li>• Create a Timeline</li> </ul>	<ul style="list-style-type: none"> <li>• Participant's Workbook</li> <li>• Task cards</li> <li>• Chart paper</li> <li>• Markers</li> </ul>
<b>Objective: Comprehend the importance of the scoping call.</b>			
15 minutes	<ul style="list-style-type: none"> <li>• Making the Call</li> <li>• Benefits of the Call</li> <li>• Questions to Ask</li> <li>• How to Use the Information Gathered from the Call</li> </ul>	<ul style="list-style-type: none"> <li>• Instructor-led Brainstorming</li> </ul>	<ul style="list-style-type: none"> <li>• Participant's Workbook</li> <li>• Pens or pencils</li> <li>• Chart paper</li> <li>• Markers</li> </ul>
<b>Objective: Identify contingency plans.</b>			
25 minutes	<ul style="list-style-type: none"> <li>• Approaches to Dealing with Unplanned Training Situations</li> </ul>	<ul style="list-style-type: none"> <li>• Disaster Scenarios</li> </ul>	<ul style="list-style-type: none"> <li>• Participant's Workbook</li> <li>• Chart paper</li> <li>• Markers</li> </ul>
<b>Objective: Explain key aspects of travel logistics related to training.</b>			
10 minutes	<ul style="list-style-type: none"> <li>• Travel Logistics</li> <li>• Communicating with Host Site</li> </ul>	<ul style="list-style-type: none"> <li>• Instructor-led Brainstorming</li> </ul>	<ul style="list-style-type: none"> <li>• Participant's Workbook</li> <li>• Training Beats posters</li> <li>• Chart paper</li> <li>• Sticky note pads</li> <li>• Markers</li> <li>• Pens or pencils</li> </ul>
<b>1 hour 20 minutes</b>			



## Lesson 3: Planning and Logistics

### SHOW SLIDE: Lesson 3: Planning and Logistics

**SAY:** Remember when we listed the best and worst attributes of trainings we've attended during the first lesson? Some of your ideas were directly related to trainers who did not adequately prepare for their training and the distractions that lack of preparation caused.

**ASK:** When a trainer is unprepared, what does that communicate to the audience?

#### FEEDBACK:

- The topic is not important.
- The audience members are not important (disrespect to the audience).
- The trainer is not knowledgeable of the topic area.

**SAY:** You should never underestimate the importance of planning for each and every training. In fact, the Boy Scout Motto is “be prepared.” To be prepared means you are physically and mentally ready to fulfill your duty. Therefore, as trainers, we should adopt the same motto. Time spent on planning and preparation can make the difference between a training disaster and a training home run.

The saying is indeed true—prior preparation prevents poor performance. So, for those of us who get nervous, being prepared increases our confidence, and in return, that confidence increases our ability to stand and deliver our trainings effectively. During this lesson, we will discuss the actions you should take to ensure your training goes as smoothly as possible.

**Objective: Create and act upon a preparation checklist.**

### SHOW SLIDE: Activity: Create a Timeline

**SAY:** Most trainers dedicate a great deal of time to preparing the content of their trainings, but forget that tasks such as logistics, room set-up, gathering adequate supplies, or even planning for breaks can make or break a training. So, we are going to spend some time focusing on details that are often overlooked but are important to consider when planning for a training.

**DO: Activity: Create a Timeline****Activity: Create a Timeline**

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**Materials:**

- Chart paper – 1 sheet per group
- Sets of task cards – 1 set per group (included in the training toolkit)
- Marker for each team

**Time:** 20 minutes

**Instructions:** Create 3–6 teams, based on the number of participants. Provide each team with a sheet of chart paper. Instruct the teams to create the following five columns: *Initial*, *Four weeks prior*, *One week prior*, *Day of*, and *Post*. As the teams are creating their timelines, distribute each team one set of task cards. Explain that each card lists one task from a pre-planning checklist. Ask participants to align each of the tasks on the cards with the appropriate timeframe on the chart paper. If the teams can identify other relevant tasks that are missing, they should add them to their timelines using a marker. After teams have completed their charts, give each an opportunity to share their timeline with the group. Provide corrective feedback, if needed.

**Instructor's Note:** Explain that "Initial" refers to information/tasks to be completed upon request of the training; "4 weeks," "1 week," and "Day of" are tasks that should be completed within the stated timeframes; and "Post" are tasks that should be completed after the training has concluded.

**DO:** Refer participants to the **Items for Preparation Checklist** handout. Facilitate a debrief discussion with the teams regarding the importance of using a preparation checklist.

**SAY:** This is only a general list of items to consider when planning your trainings. Not all of these items may apply to the type of training you do. Tailor your list to meet your training needs. Also, keep in mind that if you are requested to conduct a training, you may be provided with a preparation checklist.

**DO:** Show participants the ICN preparation checklist in your Instructor's Manual.

**SAY:** You may still personalize the checklist with your own strategies for getting organized.

However, you have much more flexibility with creating the type of preparation checklist you want to use if you are conducting your own training. Now, let's discuss some things you need to know if you are provided training at someone else's request (e.g., another school district, an agency, an organization).

## Items for Preparation Checklist

### At the Initial Training Request

- Set training date(s) and time(s)
- Identify training topic
- Determine training location
- Confirm training contact name (at location)
- Confirm contact's phone number and email address
- Confirm training address and directions
- Confirm number of attendees
- Discuss audience background and details

### Four Weeks Prior to Training

- Complete continuing education credit applications
- Make travel arrangements to location
- Place orders/requests for training materials
- Make audiovisual equipment requests/reservations
- Express desired training room set-up (classroom, theater, U-shaped, other)
- Inquire about training room accommodations (pens, pencils, paper, unique requests)
- Determine break accommodations (food and beverage)
- Collect, order, request, and organize all training props and activities
- Review or develop training content
- Rehearse delivery and practice demonstrations

### One Week Prior to Training

- Confirm all training details with location contact
- Confirm early access to the building and training room for set-up
- Confirm receipt of advanced material orders

### Day of Training

- Check training room set-up
- Conduct audiovisual equipment operation check
- Cue-up videos and organize props
- Arrange or distribute books, manuals, assessments, or handouts
- Review building layout and emergency exits

### Post-Training

- Training room clean-up
- Review of class evaluation forms
- Revision of training content

**Objective: Comprehend the importance of the scoping call.**

**ASK:** What do you think is the most important step we can take to prepare for an external training?

**FEEDBACK:** One of the most important things we can do is plan a scoping call with the site host. The site host can provide us with all the information we need to successfully develop, plan for, and facilitate our training.

**SHOW SLIDE:** *Scoping Call*

**SAY:** The site should have expectations regarding the outcomes of the training we provide. They will not have us train, just for the sake of training. Their organization has needs that must be fulfilled. By identifying the host's goals and expectations up front, we can tailor our content to ensure we achieve the desired outcomes.

**DO:** Ask participants to brainstorm reasons why it is important to have a scoping call and what questions they would ask the site host. You should record their responses on a sheet of chart paper. Discuss the group's ideas. Refer participants to the **Importance of the Scoping Call** handout. Use the handout to facilitate a group discussion of any items that were not already mentioned by the group.

## Importance of the Scoping Call

Talking with the site host will help us:

- Understand who our audience will be in terms of the number of participants, job titles, skill levels, group dynamics, and baseline knowledge on the topic. This will help us tailor the content to the audience's needs and skill levels.
- Identify responsibilities for audio-visual equipment, other technology needs, tools, materials, and supplies. Have a backup plan!
- Determine if someone will be available to assist with cue-up and testing all equipment to make sure it works properly.
- Find the training location, parking location, availability/building entry times, as well as accessible doors. Once we have entered the building in advance of our session, plan time for set up of the training room, materials and audio-visual equipment.
- Plan for required breaks (especially if the group is unionized), and identify time allotments for breaks and lunch time. For example, if food is being catered in, the lunch break may be shorter than when attendees have to go off site for lunch.

**Objective: Identify contingency plans.**

**ASK:** By show of hands who has heard of Murphy's Law? Who can tell us about it?

**FEEDBACK:** Yes, anything that can go wrong will go wrong!

**SAY:** Even when we do all of our prior preparation, the unexpected can still happen. Well-prepared trainers have a variety of contingency plans—these trainers are thinking in advance about potential issues that could arise and have strategies for addressing emergencies that could happen before and during the class. Let's see how well you can think on your feet with these training disasters!

**SHOW SLIDE:** *Activity: Contingency Planning*

**DO:** *Activity: Contingency Planning*

## Activity: Contingency Planning

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**Materials:**

**Disaster Scenarios** handout

**Time:** 15 minutes

**Instructions:** Divide the group into six teams. Assign each team a scenario from the handout. Ask the teams to chat amongst themselves to come up with a contingency plan based on their scenarios. Teams should discuss the following two questions:

- How pre-planning could prevent the disaster from happening?
- What strategies would they use to overcome this if it happens during the training event?

Allow teams to share their responses.

### Disaster Scenarios

1. The trainer can't find the location/can't enter building to set up.
2. The audiovisual (AV) equipment (e.g., projector, screen, power cords) is not available/ stopped working.
3. The trainer has a hostile, resistant, or non-participatory group.
4. The audience asks questions that the trainer cannot answer or lacks depth of knowledge about.
5. There are twice as many attendees as expected.
6. The training materials, handouts, or workbooks did not arrive, or were lost, damaged, or printed incorrectly.

**FEEDBACK:****1. The trainer can't find the location/can't enter building to set up.**

Have a pre-planning call and follow-up confirmation call with the host to verify location, important directions, anticipated traffic issues/travel times, and identify who will let you in and building entry times. Visit the location prior to the training event when possible, and allow extra travel time.

**Solutions:** Use the contact numbers (cell numbers) provided to reach your host for clarification on directions and how to locate someone to let you into the building.

**2. The audiovisual (AV) equipment (e.g., projector, screen, power cords) is not available/ stopped working.**

Have a pre-planning call and follow-up confirmation call with the host to verify responsibilities for AV; identify plans for/availability of back-up equipment and on-site AV technicians.

**Solutions:** "The show must go on." Do you have printed handouts of slides that attendees can refer to? If so, use them. Are the slides essential to learning? Create the verbal content and exercises to stand on their own. Ask for backup equipment to be available, if possible. Bring your presentation backed up to a flash drive, and borrow a laptop.

**3. The trainer has a hostile, resistant, or non-participatory group.**

The pre-planning call should address any known issues with individuals, the overall "mood" of the organization, and any barriers that may present on the training day.

**Solutions:** Focus on the WIIFM ("What is in it for me?") to pull the attendees into the importance and value of the training message to them, professionally and to their individual success.

**4. The audience asks questions that the trainer cannot answer or lacks depth of knowledge about.**

Prepare and be knowledgeable on your topic. Anticipate topic related questions and prepare answers/notes to cover them.

**Solutions:** Use the “bike rack” to post questions and during breaks look at the questions—use your smartphone to look up key references/answers. Conversely, do not be embarrassed to say you do not know; get the person’s contact information and follow up with them afterward with the desired information.

**5. There are twice as many attendees as expected.**

Pre-planning and follow-up calls should address the anticipated number of attendees and for duplicating handouts and workbooks. Identify if the location has the resources to make last-minute copies.

**Solutions:** Ask the host location to make last-minute duplications. Ask the attendees to pair up and share.

**6. The training materials, handouts, or workbooks did not arrive, or were lost, damaged, or printed incorrectly.**

Pre-planning and tracking shipped materials with sign-required delivery. Follow up with the host upon delivery notification to make sure boxes arrived intact and in good shape. Work with a trusted printer and preview the printing to ensure the documents are complete.

**Solutions:** Have training materials backed up on a flash drive. Ask the host location to make last-minute duplications of the essential/key handouts.

**Objective: Explain key aspects of travel logistics related to training.**

**SHOW SLIDE: Travel Logistics**

**SAY:** We are going to wrap this lesson up by covering some basic information related to the logistics of getting to our training location. There are a few things you will need to confirm. With your host or client, identify who will be paying for travel-related expenses and how these expenses will be reimbursed. We may also ask the host for suggestions for travel, lodging, and meals if you are not familiar with the location.

**DO:** Facilitate a group discussion using the following points:

- Car, plane, or train – regardless of who is paying, a cost comparison and travel time analysis will help determine the most cost-effective and time-effective mode to travel. For example, if you are traveling to the opposite coast, driving would cost more (price per mile) and take much longer than a flight.
- Rental vehicle or public transportation – when flying into a location, you will have access to various means of public transportation such as taxi services, local bus or subway services, and rental car services. Again, pre-plan to identify the most cost-effective and time-effective method of transportation.
- Hotel – overnight accommodations may be required if you arrive a day or more before your training. If you are unfamiliar with the city, ask your host for recommendations for hotels nearby the training venue.

**ASK:** Can you think of anything else you would add to this list on the slide?

**FEEDBACK:** Remind participants to always check with the site host regarding any relevant travel policies. Host policies should always take priority.

**ASK:** What questions do you have about what we just discussed?

**DO:** Answer participants' questions before proceeding to the next lesson.

## Lesson-at-a-Glance

Time Allowed	Topics	Activities	Materials
<b>Objective: Describe approaches for effectively opening a training and gaining the audience's attention.</b>			
20 minutes	<ul style="list-style-type: none"> <li>• Know the Material</li> <li>• Setting the Tone</li> </ul>	<ul style="list-style-type: none"> <li>• Know the Material</li> <li>• Tips for Visuals</li> <li>• Tips for Setting the Tone</li> </ul>	<ul style="list-style-type: none"> <li>• Participant's Workbook</li> </ul>
<b>Objective: List common verbal cues and techniques for improved verbal communication.</b>			
15 minutes	<ul style="list-style-type: none"> <li>• Common Verbal Cues</li> <li>• Effective Verbal Communication</li> </ul>	<ul style="list-style-type: none"> <li>• Conference Scenario</li> <li>• Tips for Improved Verbal Communication</li> </ul>	<ul style="list-style-type: none"> <li>• Participant's Workbook</li> </ul>
<b>Objective: List common nonverbal cues and techniques for improved nonverbal communication.</b>			
15 minutes	<ul style="list-style-type: none"> <li>• Common Nonverbal Cues</li> <li>• Effective onverbal Communication</li> </ul>	<ul style="list-style-type: none"> <li>• Tips for Improved Nonverbal Communication</li> </ul>	<ul style="list-style-type: none"> <li>• Participant's Workbook</li> </ul>
<b>Objective: Describe distracting habits, as well as how to avoid them.</b>			
10 minutes	<ul style="list-style-type: none"> <li>• Common Distracting Habits</li> <li>• Ways to Avoid Distraction</li> </ul>	<ul style="list-style-type: none"> <li>• Overcoming Distracting Habits</li> </ul>	<ul style="list-style-type: none"> <li>• Participant's Workbook</li> <li>• Pens or pencils</li> </ul>
<b>1 hour</b>			



## Lesson 4: Delivering Effective Trainings

### SHOW SLIDE: Lesson 4: Delivering Effective Trainings

**SAY:** Today, we have covered how adults learn, used that information to develop a training outline, and even discussed how to plan the logistical aspects of a training. Once training day arrives, we want to make sure we are prepared. So, it is important that we discuss training delivery.

Luckily, the primary skills we need to deliver effective trainings are skills that we can learn, practice, and improve upon. Learning and honing these skills will not only decrease the anxiety associated with speaking in front of an audience, which many of us have, but also increase the likelihood that the appropriate messages will be received by our audience.

During this lesson, we will cover a few of those essential skills, as well as tips that will help you become more confident in presenting information. By the end of this lesson, you will:

- Describe approaches for effectively opening a training and gaining audience's attention.
- List common verbal cues and techniques for improved verbal communication.
- List common nonverbal cues and techniques for improved nonverbal communication.
- Describe distracting habits, as well as how to avoid them.

**Objective: Describe approaches for effectively opening a training and gaining the audience's attention.**

### SHOW SLIDE: Delivery Is Important

**SAY:** As I mentioned, despite how amazing our content is, and no matter how much we plan for our trainings, poor delivery will ruin excellent content and proper planning every time. Therefore, being able to present content dynamically is an important aspect of being an effective trainer. So, we are going to discuss a few ways you can make that happen.

### SHOW SLIDE: Know the Material

**SAY:** First, we must ensure we are familiar with the material. Few things will cause us to lose credibility or our audience's attention as quickly as being unfamiliar with what we are teaching. So, it is important to take time before the training to familiarize ourselves with what we plan to say and how we plan to execute the activities we selected.

Many times, lack of preparation and/or lack of familiarity with the content is why we see trainers or presenters relying on text-heavy PowerPoint slides or reading directly from a script. We can avoid those situations by thoroughly reviewing our content in advance. In fact, it is a great idea to review it multiple times if needed. Many people even like to practice aloud or in front of others. Although this may not always be practical given the many other responsibilities we have, it is a very useful means of fine tuning our trainings. Not only that, knowing the material and having a practice run can aid in increasing confidence and decreasing anxiety when it is time to stand in front of an audience. It also helps us gain and keep the audience's attention because they will, in return, view us as the knowledgeable experts that we are. There is a handout in your Participant's Workbook that will provide you with more information about knowing your material,

**Know the Material: Q&A for the Trainer.**

**Instructor's Note:** The handout mentions visuals. Inform participants that if they are interested in more details regarding the development of visuals, the ICN's *Foundations Basics* (4-hour course) covers the topic. The handout **Tips for Visuals** is included in the Participant's Workbook.

## Know the Material: Q&A for the Trainer

### How much do you already know about the topic and what do you still need to know?

There may be times when you have to teach a topic that is completely different from your niche; in that case, you need to consider how much you already know and how much you need to learn. Doing so will allow you to be prepared to present with confidence. Also, let's say you have expertise in the topic, you then need to consider exactly what it is you need to be speaking about—don't forget knowing it all doesn't mean speaking it all. Your aim should be to keep your presentation focused on your primary learning objective(s) and getting directly to the point (i.e., need to know versus nice to know).

### How long will it take you?

Know the timing. Practice the timing. If you have 5 lessons and exceed the time planned for each lesson by 10 minutes, the training will be 50 minutes longer than you anticipated. Now what? Simply skipping over activities is not a desirable approach; they are meant to reinforce learning through hands-on experience. Keep in mind that talking faster is not the answer either—all this will do is confuse the audience. So, plan ahead and practice! Also, don't attempt to add additional content, stories, or activities at the last minute—remember, you've already practiced your timing.

### Are you using visuals? What kind and how do you plan to include them?

Visuals (e.g., handouts, PowerPoint slides, posters, infographics) add volume to your presentation and help you make your point clear. They also prove to be a perfect attention grabber. However, you need to be clear about whether you'll need to include them or not. A 5-minute talk may not require any or as many visuals as a 4-hour training. Either way, ensure you are familiar with the visuals you plan to use and how they align with the messages you want to convey.

## Tips for Visuals

### Fonts

- Choose a font that is simple and easy to read. Sans serif fonts are generally the most effective.
- Italic fonts should be avoided on slides.
- Fonts smaller than 28-point are usually difficult to read on slides.
- Do not use multiple fonts and styles. Limit choices to two within a slide presentation.

### Text

- No more than six lines of text should be used per slide, usually no more than 6 words per line.
- Use slides to convey key points only.
- Avoid capitalization of ALL letters.
- Use high contrast colors for fonts compared to background.
- Avoid long sentences and abbreviations.
- Use color or bolding instead of underlining to emphasize words or key phrases.

### Pictures and Graphics

- Use no more than two graphics per slide.
- Ensure quality of graphics.
- Refrain from using too much generic clip art.
- Choose appropriate graphs and diagrams.

### Other Tips

- Use sound effects only when necessary.
- Use numbers for sequential lists and bullets to highlight other lists.
- Be consistent. Only use differences to draw attention.
- For transitions, use “appear” and “disappear.”
- Keep tables simple with clear headings and labels.

**SHOW SLIDE: Set the Tone**

**SAY:** In addition to the importance of knowing your material, I also want to touch on the importance of the way we open our training. The way we open a training sets the tone for the remainder of the training. The saying, “You never get a second chance to make a first impression” is directly relevant to how we should begin a training. Our audience will draw conclusions about us and the topics we present by the way we communicate with them during the first minutes of a training or presentation. So, we must be mindful of how we open. The introduction provides an important opportunity for us to gain our audiences’ interest.

If you recall, we discussed the Principles of Adult Learning earlier, and according to those principles, adults want to know what’s in it for them. They also want to know how what we are teaching relates to their jobs—remember we need to “hook the learner.” There are several techniques trainers can use to ensure they have a dynamic opening, but the most commonly used techniques are infusing humor, telling relevant stories, or posing questions.

**SHOW SLIDE: Use Humor**

**SAY:** Most audiences, regardless of the setting enjoy humor, especially as part of an ice breaker. However, for humor to be effective, it must be tasteful and relevant. For example, a joke about how bad school lunch is will not likely receive an encouraging response from a group of school nutrition professionals. But keep in mind, humor does not always mean that you have to tell jokes. Funny stories and visuals (e.g., cartoons, images, or video clips) can be just as effective. In fact, showing a relevant, humorous image or video clip before beginning a training can help the audience understand what you plan to discuss while producing a positive reaction and simultaneously breaking the ice. On the downside, humor could make the audience feel obligated to laugh, or create general discomfort—it is important to consider your audience.

**DO:** Remind participants that every trainer has their own style of presenting information. With that being said, emphasize that there is no need to force humor if it is not their style or personality. Doing so is often noticeable by the audience and can cause distraction. Also, stress the importance of being sensitive to the audience. It is generally best to avoid humor related to politics, religion, gender, culture, physical or mental abilities, etc.

**SHOW SLIDE: Storytelling**

**SAY:** Storytelling can also help us connect with our audience. Actually, in some cultures, storytelling has historically been one of the most common methods of teaching others, and it remains an invaluable learning and training tool today. Many speakers begin presentations with relevant news events or a short story to hook their learners.

**ASK:** Can anyone give us an example of a training you have taught and how you incorporated storytelling?

**DO:** Provide participants with an opportunity to respond.

**FEEDBACK:** Example: Before beginning a training on Norovirus, we could mention a recent outbreak that was publicized in the news or that we heard about from a colleague at another school district.

**SAY:** Stories are a way to demonstrate familiarity with a topic from both a professional and personal perspective—which can also aid in gaining credibility with the audience. When participants find it easy to relate to a trainer, a story, or a current event, they are more likely to make a strong connection with the topic and become interested in learning more.

**SHOW SLIDE: Asking Questions**

**SAY:** Posing questions is another method we can use to connect with our audience and set the tone for the training. For example, if we wanted to present a training on knife safety, asking a question like, “What type of accident do you think results in the most emergency room visits by school nutrition professionals?” helps us focus the audience’s attention on the topic because it requires them to offer specific responses (e.g., burns, cuts, falls). You could follow up with a rhetorical question such as, “How can we stop that accident from occurring?” to lead into your presentation—that would cause the audience to begin thinking about solutions to the problem and prime them to receive the information you have planned to present. Both of these approaches, questioning for a response and rhetorical questioning, are excellent for gaining our audiences’ attention.

**DO:** Refer participants to the **Tips for Setting the Tone** handout for suggestions on setting the tone for their training. Cover any points on the handout that haven't been discussed. Allow the audience a couple of minutes to share any unique approaches they take to set the tone for their trainings and gain the audience's attention.

### **Tips for Setting the Tone**

- Always greet participants and strive to make them comfortable with you and the topic
- Consider the setting (e.g., formal versus informal, familiar group versus unfamiliar group)
- Always give an overview of the training
- Try asking the audience their expectations
- Get the audience to laugh
- Avoid inappropriate jokes/humor
  - Gender
  - Politics
  - Death
  - Violence/harm to others
  - Stereotypes
  - Degrading/putting others down
- Don't force the use of humor
- Use relevant stories or tell the audience about current events
  - Decide on a story to use in advance
  - Research current events related to the topic
  - Use examples from the group's own experience with the topic
- Ask questions
  - Plan the questions ahead of time and know the correct responses
  - Ask one question at a time
  - Keep questions focused and at the audiences' level of expertise
- Make a thought provoking statement
- Ask for a show of hands or for participants to stand
- Get the audience moving

**Objective: List common verbal cues and techniques for improved verbal communication.**

**SHOW SLIDE: Communication**

**SAY:** Now that we've discussed important aspects of opening in a way that enables us to gain our audience's attention, we are going to cover some skills that will help us maintain that attention throughout our trainings. These skills relate to the way we communicate during training delivery.

**ASK:** Can anyone tell us the two most common forms of communication?

**SAY:** Our communication is typically categorized as verbal or nonverbal. Simply put, the words we say; how our voice sounds; and our hand, facial, and other body gestures are all ways we connect with learners and ensure our message is effectively conveyed. A dynamic trainer is aware of the messages their voice and body can send to an audience. Before we go any further, there is a scenario handout in your Participant's Workbook that I would like you to read and discuss with those seated at your table.

**DO:** Refer participants to the **Conference Scenario** handout in the Participant's Workbook. Instruct them to read the scenario and discuss what went wrong with other participants at their table. Give participants about 5 minutes to complete the task.

## Conference Scenario

John recently attended a pre-conference training that was hosted by his state school nutrition association. As he sat and listened to the trainer, he noticed the trainer made very little eye contact with the audience and only stared at one point in the back of the room. John could barely hear the monotonous voice of the speaker because he was seated at a table towards the back of the room, and the speaker remained slumped over notes, at a podium that was situated at the front of the room. To make matters worse, the trainer went over the scheduled time, which meant John did not have an opportunity to ask a question he had and was late finding the next session he wanted to attend.

**ASK:** Without even being present at that pre-conference training, I bet you formed some impressions about the trainer, right? What impressions did you get? What went wrong?

**FEEDBACK:** Without us being present, I think it is safe to assume the trainer's lack of attention to verbal and nonverbal cues impacted John's impression of the training, too. This is another reminder that regardless of how well planned the training was, or how valuable the content may have been, poor delivery distracted the audience.

**SHOW SLIDE:** *Verbal Communication*

**SAY:** Verbal communication, or how we speak, can make or break our training. That is because the way we use our voices can convey many different messages (e.g., passion, interest or disinterest, confidence, frustration, confusion, enthusiasm, or lack thereof). Therefore, it can have a direct impact on the conclusion our audience draws about us or the information we are presenting. We want to convey the right message to our audience, and there are a few different verbal cues that can aid us in doing so.

**DO:** Refer participants to the **Tips for Improved Verbal Communication** handout and use the points below to explain each of the common verbal cues and tips listed. Also, offer an opportunity for participants to share their own tips and ideas for improved verbal communication.

## Tips for Improved Verbal Communication

- Be mindful of word usage, accentuation, pitch, volume, rate, and tone.
- Avoid using slang, colloquialisms, and local or technical jargon.
- Remember to tailor wording to the knowledge and experience level of the intended audience.
- Emphasize important words.
- Practice pausing before or after stating an important word or concept. This will help focus the audience's attention and shows them that what you said/are saying is important.
- Practice stating phrases using different pitch patterns to change the meaning of what you say. For example, by using higher pitch at the end of what is said, we can demonstrate that we are asking a question. Here is an example for you to try— “See what I mean.” versus “See what I mean?”
- When speaking naturally, without any amplification, you need to keep in mind the distance to be covered by your voice and adjust your volume accordingly.
- For longer rooms, aim your voice at the back of the room so those sitting farther away can hear. For wide rooms, it is a good idea to turn to both sides while speaking to ensure those sitting on both sides of the room can hear and feel included.
- Ask if the audience can hear and understand you.
- Practice alone and practice in front of an audience.
- Record yourself and listen to yourself.

### Fun Facts About Average Speaking Rates

- Presentations: between 100–150 words per minute (wpm)
- Conversations: between 120–150 wpm
- Audiobooks: between 150–160 wpm
- Radio hosts and podcasters: between 150–160 wpm
- Auctioneers: can speak at about 250 wpm
- Commentators: between 250–400 wpm

**SHOW SLIDE: Word Usage**

**SAY:** A very important verbal cue is simply our word usage. This not only includes word choice, but also using correct grammar. Using incorrect grammar or inappropriate words can distract the audience from the content and can give a negative impression of the trainer. Also, avoid using local jargon (i.e., terms that are only well known in a particular area/region)—this could lead to confusion and misunderstandings. We should always try to limit the use of technical jargon, when possible. If it is necessary to introduce unfamiliar terms or concepts, we should aim to explain them in ways our audience can understand.

**SHOW SLIDE: Word Accentuation**

**SAY:** When we accentuate something, we place emphasis on it. So, word accentuation simply means that we emphasize a certain word or phrase. In the context of teaching others, we accentuate words to let them know that the word or phrase is particularly important. A short pause following an accentuation usually helps reiterate the importance of the point. In fact, a pause alone enables us to emphasize the importance of a key point.

**SHOW SLIDE: Pitch**

**SAY:** When you hear the term pitch, simply think of the highness or lowness of the voice. We unconsciously vary our pitch to convey different meanings in everyday conversation. For example, by raising, then lowering our pitch we demonstrate uncertainty (e.g., I think that's right."). Using a higher pitch at the end of a phrase allows us to demonstrate that we are asking a question versus making a statement (e.g., "They are?" or "He's going home?"). We also use a higher pitch at the end of a phrase to show excitement (e.g., "That's correct!"). We can consciously use this same approach when communicating during training. As with accentuation, you can use pitch to draw the listeners' attention to words or phrases that are more important than others and most importantly to convey the correct message.

Think about how many times you've heard a trainer ask a question and the audience just sat there because they didn't even realize the trainer expected a response—in this instance a varied pitch can make a difference.

**SHOW SLIDE: Volume**

**SAY:** Volume is the degree of loudness or intensity of a sound. In the context of this lesson, volume refers to how loudly or softly we speak. None of the other verbal cues will matter if we cannot be heard. So, we should always ask the audience if they can hear us. If not, we should make adjustments to our volume versus asking them to move—remember it is our responsibility to make sure the audience can hear us and not the other way around. Knowing where you will be training and who you will be training, beforehand, can aid you with this verbal cue (e.g., group's age and size, room size and arrangement).

**SHOW SLIDE: Rate**

**SAY:** Rate is how fast or slow a person speaks and is typically expressed by the number of words spoken per minute. When we are nervous or pressed for time, we are more likely to speak faster. However, speaking too quickly could confuse our audience because they might miss key information. So, it is important to make sure the rate at which we speak is slow enough that everyone can understand what we are saying. Many times participants become frustrated or lose interest if they cannot hear or fully understand the trainer. If you notice the audience seems confused, repeatedly asks you what you said, or begins to talk amongst themselves to find out what you said, then your rate may be too fast and/or you need to increase your volume. Remember, it is never a bad idea to ask if you are speaking loud enough or at an acceptable rate.

**SHOW SLIDE: Tone**

**SAY:** We've all heard the saying, "It's not what you say, but how you say it." Our tone is simply how we convey words. The pitch and volume we use, as well as the rate at which we speak, are all a part of our tone and impact our audience's perception of what we are saying. So, as trainers, we must be mindful of using the appropriate tone for our content and the message we want to convey. Think about it—not only does listening to a trainer who is monotone make the trainer seem less enthusiastic about what they are saying, but it also detracts from the audience's interest level despite how great the content might be. So, we should be mindful of our tone and attempt to vary it to keep the audience engaged.

**ASK:** Can anyone think of other important verbal cues that can impact training delivery? Any additional tips based on your experiences?

**DO:** Allow the participants to respond, and thank them for sharing their ideas. Also, tell participants that verbal cues may vary among different cultures and/or languages.

**Objective: List common nonverbal cues and techniques for improved nonverbal communication.**

**SHOW SLIDE:** *Nonverbal Communication*

**SAY:** Communication isn't just about the words we say and how we say them. It also includes how we use our bodies to convey a message. Nonverbal cues are the way we communicate through our facial expressions, body movements, and gestures. Usually, many of the first impressions formed about a speaker stem from the way they appear, such as how they are dressed and whether they are standing tall, staring at the ground, or fidgeting with objects. Nonverbal cues aid us in smooth presentation delivery by reconfirming the meaning behind a spoken word. Important nonverbal cues in presentation delivery include posture, eye contact, body movement, and facial expression.

**DO:** Refer participants to the **Tips for Improved Nonverbal Communication** handout and use the points below to explain each of the common verbal cues and tips listed. Also, offer an opportunity for participants to share their own tips and ideas for improved verbal communication.

## Tips for Improved Nonverbal Communication

- Practice using good posture and making eye contact, as well as using body movement and facial expression to connect with the audience and get your point across.
- Stand tall and try to avoid slouching.
- Don't turn your back to the audience—face them as much as possible. Avoid staring at a computer screen or notes.
- Establish eye contact with various members of your audience. It will not only help establish trust and make them feel included, but it shows them that you are a confident presenter.
- Effective eye contact doesn't mean you have to stare. Making eye contact should be comfortable for both you and the person you are looking at. Typically, four to five seconds is long enough.
- Avoid remaining anchored to a podium or table. Move around and engage the audience.
- Use your arms and hands to communicate what you are saying. However, don't force unnecessary movements.
- Be mindful of gestures—they can mean different things in different cultures.
- Avoid unnecessary body movements and excessive pacing. This can become distracting.
- Facial expressions are a more universal language. Smile when greeting participants. You want to create a warm, friendly atmosphere where everyone feels welcome and as though you are happy they are there.
- Be respectful of personal space because different cultures view physical proximity in different ways. If you notice someone appears uncomfortable, create some distance between the two of you.
- Aim to look your best, which includes dressing professionally.
- Take notice of your audience's nonverbal cues also.

**SHOW SLIDE: Posture**

**SAY:** Our posture can say a lot about us and how we feel. For example, good posture conveys confidence. When I say good posture, I mean standing tall, with the chest slightly out, and the head back. Trainers who stand tall with feet shoulder-width apart, hands at the waist, and weight concentrated on the balls of the feet appear more attentive. Trainers who sit in a chair, or hide behind tables or podiums, may appear less confident or as though they aren't very enthusiastic about delivering the training. Standing in front of the audience without any of those crutches gives a more positive first impression.

**SHOW SLIDE: Eye Contact**

**SAY:** Lack of eye contact can also send many unflattering messages such as distrust, apprehension, nervousness, lack of confidence, or boredom. On the other hand, appropriate use of eye contact signals confidence and connects us with the audience at a personal level. Appropriate eye contact includes connecting briefly with different participants throughout the training.

Try to avoid focusing on one participant for an extended period of time, but rather scan the audience and make eye contact with different participants. Whether standing in front of a large or small group, eye contact can make all participants feel included.

**SHOW SLIDE: Body Movement**

**SAY:** Body movement is another important nonverbal cue. Trainers who move freely demonstrate a greater level of comfort with themselves and the topic and tend to maintain a higher level of audience interest. Arm and hand gestures are appropriate ways to express feeling. Motioning with arms and hands while asking, "what can we do?" would have greater impact than if arms were resting at one's side. In fact, some people say body language is more important than the spoken word. However, body movement is not necessarily needed or as effective unless there is a purpose behind the movement.

If you've ever watched a highly scripted presenter, those who carefully choreograph each movement, they can appear very unnatural. In those instances, the movement becomes distracting rather than a method of enhancing your message.

**SHOW SLIDE: Facial Expressions**

**SAY:** There are so many cultural variations of meaning when it comes to nonverbal cues. That is something we must be mindful of. The last thing we want to do is offend anyone in our audience, right? The beauty of facial expression is that it is more of a universal language. Our facial expressions help us convey many unspoken words. For example, in most cultures a smile conveys that we are happy, while a frown can indicate disapproval or unhappiness.

**ASK:** Can anyone think of other important nonverbal cues that can impact training delivery? Any additional tips based on your experiences?

**DO:** Allow the participants to respond, and thank them for sharing their ideas.

**Objective: Describe distracting habits, as well as how to avoid them.**

**SHOW SLIDE: Distracting Habits**

**SAY:** In addition to effective delivery skills, a trainer needs to be aware of distracting habits. This is not always the easiest thing to do since we often fail to recognize we possess these potentially distracting habits. For example, many trainers have a favorite nuisance word or phrase that tends to be inserted between thoughts and during lulls. Words such as um, okay, like, and you know may be distracting to the audience. With the overuse of these words, the audience begins to anticipate your next use of the word. This draws attention away from the information being presented. However, with practice, speakers can train themselves to connect thoughts without using these distracting words or phrases.

Other distracting habits include excessive pacing and fidgeting with one's jewelry, hair, or other items. While many trainers are usually unaware of these distracting habits, the audience quickly becomes aware of them. Practicing in front of a mirror, peers, or recording and critiquing the presentation can aid in identifying these habits and other distracting practices such as placing hands in pockets and jingling keys or coins in the pockets.

**DO:** Refer participants to the **Overcoming Distracting Habits** handout. Discuss the tips listed for each of the habits. Provide examples of approaches you take, and invite participants to share their ideas for addressing each of the habits.

**ASK:** Can you think of any other distractions that we didn't cover? Any ideas on what we can do to avoid them?

**DO:** Thank the participants for their feedback.

**SAY:** The final portion of today's training will be dedicated to applying all the things you have learned today to design and delivery a mini training.

**ASK:** Before we move on to our final lesson, what questions do you have?

**DO:** Answer any questions participants might have.

## Overcoming Distracting Habits

Here are some common distracting habits and ideas for avoiding them.

### Nuisance Words

- When ending a thought or sentence, simply close your mouth to avoid the words.
- Practice speaking short points, while focusing on how to transition between the points without using nuisance words.

- \_\_\_\_\_
- \_\_\_\_\_

### Fidgeting

- Use arms and hands while talking.
- Keep pockets empty.
- Style hair so that it stays out of your face.

- \_\_\_\_\_
- \_\_\_\_\_

### Lack of Eye Contact

- View your audience as individual listeners.
- Practice your presentation so that you don't have to stare at notes.

- \_\_\_\_\_
- \_\_\_\_\_

### Pacing

- Stand in one spot until the point being made is complete.
- Take a walk before your training to help release tension and calm your nerves.

- \_\_\_\_\_
- \_\_\_\_\_

## Lesson-at-a-Glance

Time Allowed	Topics	Activities	Materials
<b>Objective: Apply best practices to design and deliver a training.</b>			
30 minutes	<ul style="list-style-type: none"> <li>• Utilizing the ROPES Model</li> <li>• Evaluation Rubrics</li> </ul>	<ul style="list-style-type: none"> <li>• Designing a 10-minute Training</li> </ul>	<ul style="list-style-type: none"> <li>• Participant's Workbook</li> <li>• Pens or pencils</li> </ul>
1 hour	<ul style="list-style-type: none"> <li>• Presentation Anxiety</li> <li>• Delivering a Training</li> </ul>	<ul style="list-style-type: none"> <li>• Presenting a 10-minute Training</li> <li>• Using an Evaluation Tubric</li> </ul>	<ul style="list-style-type: none"> <li>• Participant's Workbook</li> <li>• Pens or pencils</li> <li>• Video recorder (optional)</li> </ul>
<b>1 hour 30 minutes</b>			



## Lesson 5: Application and Practice

**SHOW SLIDE:** *Lesson 5: Application and Practice*

**SAY:** We have made it to our final lesson. During this lesson, we are going to dedicate our time to completing an activity that will enable you to practice what you have learned today. So, you will use the blank **ROPES Lesson Plan Template**, located in your Participant's Workbook, to plan a 10-minute training on a topic of your choice. However, the topic must be related to child nutrition. Using the knowledge gained during our lessons today, each of you will also have an opportunity to deliver your training to an assigned group. The purpose of this exercise is to provide you with an opportunity to practice delivering a training in a safe environment, amongst a small group.

**Objective: Apply best practices to design and deliver a training.**

**SHOW SLIDE:** *Activity: Application and Practice*

**SAY:** Before we begin, turn to the **Evaluation Rubric** in your workbook. Evaluation Rubrics can aid us in assessing how well a skill is performed. While this evaluation rubric may appear generic, it aligns with the core skills that effective trainers possess. We have discussed each of these skills today. Once we begin the presentation portion of the lesson, each member of your "audience" will complete an evaluation rubric and give it to you. Afterwards, you can compare the results and work to improve your presentation skills. Also, if you have a phone with video capability, it would be an excellent idea for you to have one of your "audience members" record you presenting your training. You can refer to your video later to identify areas you would like to improve.

**DO: Activity: Application and Practice**

## Activity: Application and Practice

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### Materials:

- **Ropes Lesson Plan** Template
- **Tips for Eliminating Presentation Anxiety** handout
- **Evaluation Rubrics** (3 per participant)
- Pen or pencil

**Time:** 1 hour and 30 minutes

**Instructions:** Divide the class into multiple groups of three. Refer participants to the **Ropes Lesson Plan Template** in the Participant's Workbook. The blank template should be used for them to map out their training using the steps in the ROPES model. Participants can refer back to other handouts and worksheets as needed.

**DO:** Give the participants 30 minutes to develop their 10-minute trainings. While the participants are working, rotate around the room to provide guidance, as needed. Once the 30 minutes are up, review the **Tips for Eliminating Presentation Anxiety** handout with the class. Explain that presentation anxiety is a very common fear, but the more they practice the easier it will get. The tips provided will help. Allow the participants to share any tips they may have. Then, allow participants to present their lessons to those in their group (10 minutes per presentation with 5 minutes allotted for feedback from their group for a total of 45 minutes). Remind participants to complete a rubric for each person in their group and provide constructive feedback in a respectful manner. As groups are presenting, rotate around the room and provide positive feedback.

**SHOW SLIDE: CONGRATUATIONS!!!**

**SAY:** Congratulations! You just designed and delivered your own training. I know this was challenging, but I hope you view it as a positive experience and that you will use the feedback you received to continuously improve your training development and delivery skills. Give yourselves a hand!

## ROPES Lesson Plan Template

<b>Lesson Title:</b>	
ROPES Outline	Content Outline
<b>R – Relate and Review</b>	<b>Demonstrate the need for this information/skill, gain interest, and ready the learner.</b>
<i>“What’s in it for me?”</i>	
<b>O – Overview</b>	<b>Summarize key content/give on overview of what will be taught, as well as explain what we expect participants to be able to do (i.e., learning objectives).</b>
<i>Establishing expectations”</i>	

<p><b>P – Presentation</b></p>	<p>Ensure all learning objectives are achieved, we need to list and describe the method(s) that will be used to achieve each outcome. Remember, there are many ways we can teach, not just through lecturing.</p>
Empty space for content	
<p><b>E – Exercise and Evaluate</b></p>	<p>Describe action-oriented, hands-on, learner-focused activities for each learning objective. Also, how will we measure success?</p>
Empty space for content	
<p><b>S – Summary</b></p>	<ul style="list-style-type: none"> <li>- Lesson recap</li> <li>- Questions and answers</li> <li>- Trainer assessment/evaluation</li> </ul>
Empty space for content	

**Additional Notes:**

**Additional Notes:**

## Tips for Eliminating Presentation Anxiety

- **Avoid caffeine.** Caffeine can increase your heart rate and make you feel more jittery and shaky.
- **Take deep breaths.** Deep breaths will help alleviate tension, as well as muscle tightness.
- **Make eye contact.** Eye contact will help you feel as though you are talking to a person one-on-one, thereby reducing thoughts about the overall number of people in the audience. Also, connecting with individuals via eye contact will help increase your confidence that the what you're saying is being understood.
- **Don't stand still.** Gesturing or moving will aid you in releasing some of the tension you may be feeling. Trainers who stand stiff and erect or anchored to a podium may find movement as a welcome relief..
- **Be organized and prepared.** Have a plan for what you're going to say and do. Make sure you have everything you need before the day of the training as well. This will not only give you more confidence, but it will allow you to focus on connecting with your audience versus worrying about what to do or say next.
- **Engage with your audience.** Asking questions, incorporating activities, and encouraging participation from the audience will help alleviate some of the tension you may feel because you will not be the central focus during the entire training.
- **It is okay to pause.** If you lose track of what you were saying or what you should do next, don't panic. Just take a few deep breaths, gather your thoughts, and move forward. The beauty of the situation is that no one else knows what you had planned to do or say except you. So, don't worry about "messing up" and know there is nothing wrong with taking a moment to look back at your notes.
- **Practice, Practice, Practice.** Remember, nothing will help you be prepared or ease your anxiety more than practice. It is helpful to practice in front of others to receive feedback before the day of your training. If you don't have time to practice in front of anyone, it is a good idea to at least let someone review the lesson you've planned.
- **Stop overthinking.** More than likely you appear much less nervous to your audience than you think. So, you should never apologize or state that you're nervous. Also, don't consume yourself with worrying about what could go wrong, the audience is genuinely interested in what you have to say—so, focus on telling them versus dwelling on things that are unlikely to occur.

### Evaluation Rubric

	Excellent	Good	Fair	Needs Improvement
<b>CONTENT</b>				
Clearly written objective(s)				
Effective opening				
Well organized				
Involved participants				
Effective closing				
Effective Q&A				
Comments:				
<b>DELIVERY</b>				
<b>Verbal Skills:</b>				
Appropriate word usage				
Pitch				
Volume				
Rate				
Tone				
Comments:				
<b>Nonverbal Skills:</b>				
Posture				
Eye contact				
Body movement				
Facial expressions				
Comments:				

## Lesson-at-a-Glance

Time Allowed	Topics	Activities	Materials
10 minutes	<ul style="list-style-type: none"> <li>• Wrap Up</li> </ul>	Activity: Wrap Up	<ul style="list-style-type: none"> <li>• Index Cards</li> <li>• Pen or pencil for each participant (needed throughout training)</li> </ul>
20 minutes	<ul style="list-style-type: none"> <li>• Final Tasks</li> </ul>	<ul style="list-style-type: none"> <li>• Complete Post-Assessment</li> <li>• Review correct Answers</li> <li>• Evaluations</li> <li>• Distribute Certificates</li> </ul>	<ul style="list-style-type: none"> <li>• Training Post-Assessment</li> <li>• Training Post-Assessment Answer Key</li> <li>• Training Evaluations</li> <li>• Certificates</li> </ul>
<b>30 minutes</b>			



## Lesson Plan

**SHOW SLIDE:** Activity: Wrap Up

**SAY:** That brings us to the end of this training. Before we move on to the post-assessment, I'd like us to do one last activity.

**DO: Activity: Wrap Up**

### Activity: Wrap Up

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**Materials:**

- Index card for each participant
- Pens or pencils

**Time:** 5 minutes

**Instructions:** Instruct participants to think about everything they learned during the training. Based on what they learned and their final thoughts regarding their experience, tell participants to write their responses to the two questions on the slide on their index card. Then, have participants move around the room and share their responses with two other people.

**ASK:** Would anyone like share what they wrote or share any thoughts about the training?

**DO:** Allow participants to share their thoughts and thank them for the feedback and participation throughout the training.

**ASK:** What questions do you have?

**DO:** Answer any questions the participants may have.

**SHOW SLIDE:** Post-Assessment

**SAY:** Thank you all for your participation during the training today. I hope you found it beneficial. It is now time to complete the **Training Post-Assessment**. Earlier, you were asked to write a 4-digit identifier at the top of your pre-assessment. You should write that same identifier at the top of your post-assessment.

**DO:** Distribute the **Training Post-Assessment**, and give participants a few minutes to complete it. Once participants have completed the assessment, collect them, and review the answers aloud using the **Training Post-Assessment Answer Key**.

**ASK:** Ask participants what questions they have regarding the assessments.

**DO:** Answer any questions the participants may have.

**SHOW SLIDE:** **ICN**

**SAY:** Accessing ICN via the web is an excellent way to have access to accurate and up-to-date resources. Visit [www.theicn.org](http://www.theicn.org) to download available free resources. ICN also keeps regularly updates information about other trainings they are offering. If you are interested in additional resources related to any of the topics discussed today, contact ICN and an Education and Training Specialist can assist you.

**DO:** Provide the participants with the course evaluation and time to complete it. Close the class by ensuring all participants have signed the sign-in sheets and distribute the training certificates. Thank your participants again for their presence, open mind, and participation.

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