

Fundamentals of Effective Instruction

Training volunteers to conduct the PiT count properly is one of the key roles of the PiT Count Coordinator. Friesen, Kaye and Associates (FKA) has compiled this section to provide both theoretical and practical information to support PiT Count Coordinators in succeeding in this role.

This section contains reference material to define two basics of effective instruction:

- The Adult Learning Principles
- The Systematic Learning Process (and Checklist)

Adult Learning Principles

Pages 3-4

There are ten principles of what adults need, want and appreciate to help them succeed.

Systematic Learning Process

Pages 5-6

Following the Systematic Learning Process ensures a lesson is presented in a way that:

- Grabs and holds the learners' attention
- Transfers the content in a relevant and meaningful way
- Tests for understanding as the lesson is presented
- Emphasizes the importance of letting learners practice
- Provides supportive and constructive feedback as learners practice

Systematic Learning Process Checklist

Pages 7-9

Use this valuable checklist as you are planning your lesson and to review your lesson when you are done.

Bibliography

Pages 10-13

The final component of this package is a four-page bibliography of books, magazines, online resources and conferences that support instructional excellence.



Kalman Green

Kalman Green is a Senior Associate with Friesen, Kaye and Associates. He is also a management consultant, professional facilitator, executive coach and popular speaker who specializes in the areas of performance improvement, organizational development and change management. His areas of expertise include strategic planning, leadership, team-building, performance management, career development and personal effectiveness.

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Over the 25 years Kalman has spent as a practitioner in the training and development field, he has consulted to organizations in the private, public and not-for-profit sectors in Canada, the United States and overseas. Some of the clients that Kalman has worked with include Air Canada, Bank of Montreal, ExxonMobil, FedEx, Gilda's Club, Microsoft, Pfizer, Siemens, St. Michael's Hospital and Whole Foods.

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Friesen, Kaye and Associates (FKA)

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Adult Learning Principles

1. Adults must have a reason to learn.

During the lesson introduction, effective instructors establish the learners' motivation for the topic. Session objectives are connected to these learner needs as well as to organizational needs and goals. Ongoing strategies are used to maintain the learners' willingness to learn throughout the session.

2. Adults must be involved in the learning.

Just listening to facts leaves learners passive and often bored. The amount of information retained and which can be put to productive use is minimal. Provide opportunities for the learners to develop and discuss lesson concepts. Effective instructors 'mine the gold' that learners bring into the room as a way to ensure interactive instruction.

3. Adults learn by building on experience.

Adults learn by relating new information to their own rich reservoir of life experience and to the experiences of others. Effective instructors know how to build on that experience by drawing examples and information from the group. They also use it to help learners connect what they already know to new learning.

4. Adults learn by doing.

Comprehensive lessons include opportunities to apply learning to real-life situations. This builds confidence and skill through practice in the supportive environment of the classroom. Application exercises allow for the repetition needed to remember new information and to increase the likelihood of recall and utilization of that information outside the classroom.

5. Adults learn in different ways and at different rates. Adults need a variety of methods.

Each person has a preferred learning style. The learners in any given instructional setting will possess a range of preferences. Coupled with the range of learning preferences, will be a range of rates at which the learning is picked up. Using a variety of instructional methods enables an instructor to appeal to the greatest number of different styles as well as varying rates of learning.

6. Adults need a meaningful program.

Effective programs are relevant to the 'real world' situation of the learners. Most adult learners take training courses for specific reasons. They are most receptive to instruction which is clearly related to problems they face daily. Ensuring that content and materials are practical and that they correspond to assessed needs will support success in life and/or work situations.

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7. Adults need a safe environment.

Coming to a learning activity can provoke anxiety for many adults. It may have been awhile since their last formal learning session and they may not have positive memories. Effective instructors are aware of this and ensure that the learning environment is not only physically safe but psychologically safe as well. Be aware of the physical environment and communicate any emergency procedures that are relevant to it. Conduct the training in a way that guards the learners' physical and psychological safety while bolstering their self-esteem.

8. Adults appreciate constructive feedback.

Adult learners want to know how they are doing, whether they are learning correctly and how they could do even better. They learn best when they feel supported while experimenting with new ideas and skills. Effective programs are built on appropriate reinforcement which provides specific, immediate and constructive feedback.

9. Adults appreciate an informal environment.

Instructors should promote getting acquainted and interpersonal connections amongst learners early in a program. Adults learn better when they feel comfortable and at ease with their peers.

10. Adults appreciate being treated with dignity and respect.

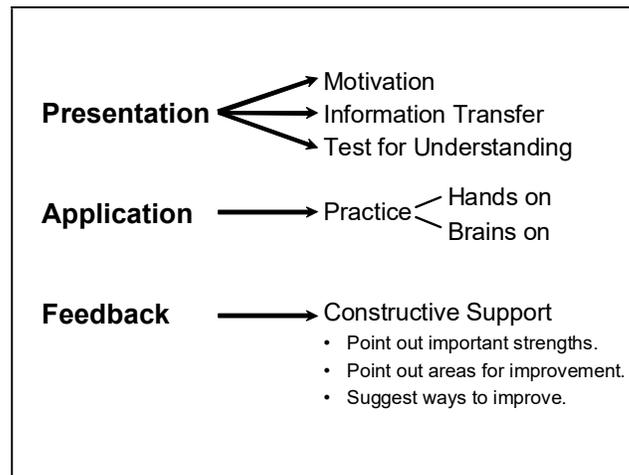
Effective programs are concerned with gain, not with proving inadequacy. They aim for success for each individual learner. Honoring the principles outlined above will ensure that success is achieved with dignity.



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Systematic Learning Process

The Systematic Learning Process (SLP) is the essence of lesson design. Consistent use of this simple formula sets learners up for success by ensuring that they acquire the skill and knowledge that is being presented. Regardless of the presentation method and supporting media being used, effective instruction includes all the components shown in the diagram below.



Presentation

Motivation

This is the first component of Presentation. Motivation has two stages:

- (1) Initial - The initial motivation hooks the learners by identifying the value and relevance of the training. It answers the learner question “What’s in it for me?” (WIIFM).
- (2) Ongoing – The motivation is maintained to keep the learners interested and actively participating throughout the training. It often builds on the initial WIIFM.

Information Transfer

This is the second component of Presentation. New facts, information, procedures, skills, etc. are introduced and explained to the learners. Presentation methods frequently used include: lecture, demonstration, discovery, discussion, field trip, group presentation, individual presentation, interview, reading, various forms of self-instruction, tutorial.

Incorporating the VIVE formula ensures that you maximize learning:

- **V**ariety
- **I**nteraction
- **V**isuals
- **E**xamples

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Testing for Understanding (TFU)

This is the final component of Presentation. It is often integrated with the Information Transfer in order to keep learners actively participating and to ensure that they are 'getting it.' It is accomplished by asking questions related to the content just covered or through short activities.

Application

During Application, the learner uses the content presented during Information Transfer. This component provides the opportunity to practice new things learned before the end of the training session. It may be repeated a number of times to assure mastery. Application methods frequently used include: case study, discovery, game, practical exercise, question and answer, questionnaire, role playing, simulation. This opportunity for practice during training builds the learners' competence as well as confidence and enhances the likelihood that what was learned during training is used back on the job.

Feedback

The learner receives constructive support regarding the accuracy or adequacy of the responses made during Application. This support can come from the instructor, peers in the class or from the learners themselves.

- Feedback must be:
- **S**pecific
 - **I**mmEDIATE
 - **C**onstructive
 - Point out important strengths.
 - Point out areas for improvement.
 - Suggest ways to improve.

Instructional Process

This P A F method may be used repeatedly, employing different presentation methods and media for each chunk of content. Several chunks of information may be presented before Application and Feedback.

The gold standard ratio for how much time to spend on Presentation, Application and Feedback is 30-40% for Presentation and 60-70% for Application/Feedback. Circumstances may dictate a 50%:50% ratio. Generally, more than 50% Presentation moves away from training that supports performance improvement towards instructor focused provision of information. When this happens, learner participation, interaction and skill development are compromised.



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Systematic Learning Process Checklist

A. Objectives	Yes	No
1. Are objectives clearly stated to the learner?		
2. Are objectives stated early in the lesson making it clear how they will be met during training?		
3. Are the objectives related to job requirements?		
4. Do the objectives describe actions the learner will be able to perform by the end of training?		
5. Are the objectives measurable?		
6. Are the objectives realistic?		
7. Do the objectives avoid passive words like "know, learn, understand"?		
B. Motivation		
1. How does the lesson meet learners' needs?		
2. Is the importance of the content pointed out?		
3. Does learner recognize the need and relevance of the information?		
C. Information Transfer		
1. Is an agenda posted and reviewed?		
2. Is there variety in methods and media?		
3. Is there a change in method, media or activity at 20 minute intervals or less?		
4. Is the level of challenge appropriate?		
5. Are instructions for scheduled activities explained to the learner?		
6. Is nice-to-know data used to spark interest?		
7. Is excessive nice-to-know data avoided?		
8. Is the pace varied?		
9. Is the relationship between content and job conditions pointed out?		
10. Is the learner constantly responding to and applying the content?		
11. Is the lesson designed to make the learner successful in most responses?		
12. Do learners have a chance to express themselves?		
13. Is material introduced in an appealing way?		
14. Is material introduced with enthusiasm?		
15. Is the focus of the presentation on the learners rather than on the methodology or media?		
16. Is there interest in the learners as individuals?		



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C. Information Transfer, <i>continued</i>	Yes	No
17. Are cooperative efforts planned?		
18. Are strategies employed to produce group interaction?		
19. Are small group exercises planned?		
20. Do small groups consist of 3-6 people?		
21. Are similarities and differences with previous learning pointed out to the learner?		
22. Is technical jargon omitted where possible?		
23. Are common terms used to explain material?		
24. Is more than one sense employed by the learner?		
25. Is enough content covered in the time available?		
26. Is overloading of the learners avoided?		
27. Is the sequence appropriate? (See checklist entitled Organizing and Sequencing)		
28. Are key items covered in the beginning and/or end of the lesson?		
29. Is overlearning done for memory-type items?		
30. Are examples based on familiar situations and objects?		
31. Are plenty of examples, cases, samples, etc. used to provide need and relevance?		
32. Does the lesson address job requirements?		
33. Are complex items repeated in different words?		
D. Testing for Understanding - Questioning:		
1. Are frequent reviews and summaries done?		
2. Are the reviews and summaries done by the learners?		
3. Is there a final summary?		
4. Are questions used to test for understanding?		
5. Is there a test for understanding at the end of each unit of instruction, by observing non-verbal signs as well as by listening?		
6. Is there a test for understanding by reviewing or restating an idea before your learners attempt to apply the idea?		
7. Are learners congratulated for a good answer without rephrasing or expanding upon it?		
8. Is there a test for understanding after the presentation of a difficult concept?		
9. Is there a test for understanding after the presentation of a key or basic concept?		
10. Is there a test for understanding before application/practice sessions?		

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E. Handling Questions	Yes	No
1. Do you concentrate on what is being said even if you don't agree or are not interested?		
2. Do you listen to the other person's viewpoint?		
3. Do you clarify what the speaker has said by restating, in similar words, the meaning you understood?		
4. Do you look at the person who is speaking?		
5. Do you concentrate on the speaker's meaning rather than on how he or she looks?		
6. Do you hear sounds without being distracted by them?		
7. Do you listen to the speaker without judging or criticizing?		
8. Do you allow the speaker to vent negative feelings toward you without becoming defensive?		
9. Do you recognize that words can mean different things to different people?		
10. Do you seek clarification or confirmation?		
11. Do you listen carefully to the question, identifying key issues?		
12. Do you repeat a learner's question to ensure that everyone, including yourself, heard it correctly?		
13. Do you divide the question into parts if it is long and complex?		
14. If asked for facts, do you reply with facts and supporting data?		
15. Do you tie in your answers to key points in your lessons?		
16. Do you look for opportunities to relay or reverse the question?		
F. Application and Feedback		
1. Is approximately 60%-70% of the lesson devoted to application and feedback?		
2. Is presentation limited to approximately 30%-40% of the lesson?		
3. Do learners actually perform the tasks?		
4. Are component parts practiced before total tasks are attempted?		
5. Is a "model" of good performance presented to learners before they must respond?		
6. Is there enough practice under varied conditions to assure transfer to the job situation?		
7. Do early practice sessions contain more prompting than later ones?		
8. Is practice distributed appropriately over the lessons?		
9. Do early practice sessions contain fewer complexities and variables than later ones?		
10. Is feedback provided to learners about their performance?		
11. Is the feedback specific?		
12. Is the feedback immediate?		
13. Is the feedback constructive?		



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Performance Improvement Journal – 10 issues per year published by the International Society for Performance Improvement (www.ispi.org) – available online through www.WileyInterscience.com

Speaker – 10 issues per year published by National Speakers Association (www.nsaspeaker.org)

TD (Talent Development) – published monthly by the Association for Talent Development (www.td.org) – free to members

Training – published monthly by The Lakewood Media Group (www.trainingmag.com)



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Other Resources

CompTIA – CTT+ is a cross-industry certification program for classroom and/or virtual classroom trainers www.comptia.org

Creative Training Techniques Newsletter – published monthly in hardcopy format – includes a resource web site, digital newsletter, teleseminars and more. www.creativetrainingtech.com

Effective Business Presentation – online articles on perfecting your sales presentations www.presentations.com

Learning Trends – a free e-mailed newsletter from the MASIE Center providing updates on technology and learning www.masie.com

Presentations.com – free online articles published by The Lakewood Media Group; articles are organized into categories: Creation, Delivery, Venue, Technology, Products and Feature. www.presentations.com

TD at Work – Association for Talent Development’s monthly short-format publication; formerly called Infoline <https://www.td.org/Publications/TD-at-Work>

Thiagi Online Newsletter – a free monthly e-newsletter of “seriously fun” activities for trainers, facilitators, performance consultants, and managers www.thiagi.com

Training Executive Exchange – a free discussion-driven e-mail newsletter published by The Lakewood Media Group; allows you to seek input from training management peers about professional challenges www.trainingmag.com

Training Tech Talk – a free e-newsletter on e-learning published by The Lakewood Media Group to provide hands-on how-to’s to make e-learning work www.trainingmag.com

Conferences for Instructors

Association for Talent Development – Annual international conference and events sponsored by local chapters (www.td.org)

Institute for Performance and Learning – Annual national conference and events sponsored by local chapters (performanceandlearning.ca)

International Society for Performance Improvement – Annual conference and events sponsored by local chapters (www.ispi.org)

National Speakers Association – Conventions and workshops (www.nsaspeaker.org)

The Masie Center – Annual conference (www.masie.com)

Training Magazine Events – Annual conferences (www.trainingmagevents.com)

