

Closing - Day 1

Equipment, Materials, Supplies

- ☐ Newsprint, Easel, Marker pens, Masking tape
- ☐ Blue (or a second color other than white) index cards, size 3" x 5", one per participant.
- ☐ Pink (or a third color other than white) index cards, size 3" x 5", one per participant.
- ☐ Evaluation Questions for Modules 1 - 3, one set of questions for each participant

Room Arrangements

Round tables should be set up with six chairs placed in a semicircle around each table facing toward the front of the room.

Place one blue and one pink index card on each chair (or at each participant's place).

Time/Materials

Content/Activities

Review / Preview

10 minutes

***Expectations
list (posted)***

ASK participants to summarize the key content and purpose of today's activities

REFER to the expectations list to see if participants learned what they had hoped to learn and if there were remaining questions to be answered or addressed on the topics covered today. Mark off those expectations that you agree were met.

PREVIEW the next day's agenda by describing Modules 4 - 8 and explaining how each is associated with the others.

Feedback

5 minutes

***two colors of
index cards***

TELL participants : It is important to the success of this training to solicit their feedback. If feasible, trainers will make modifications based on this feedback to better meet the needs of the group.

TELL participants that today we will use written feedback, using the index cards on the tables.

ASK participants to write one thing they liked, or one thing they would like to continue doing related to what happened today on an index card of one color (blue) and one thing they would like to change on an index card of another color (pink).

COLLECT the cards and **TELL** participants you will respond to their feedback at the beginning of tomorrow's session.

Homework***2 minutes***

TELL participants they will prepare a 5-minute competency-based, just-in-time training on a subject of their choice during the Training Workshop on Day 4. Time will be allotted during the training to prepare and practice their training topic. At this time participants may begin to think of what topic they would like to use for their presentation and what skill they will be teaching.

EMPHASIZE the need to select a topic in which they will be able to teach their colleagues how to do something – actually perform something in the classroom. Start their thinking with examples such as – how to tie shoe laces, how to cut paper dolls, how to brush teeth – some skill that can be done by participants, in the classroom, with available materials.

Evaluation***10 minutes***

***Evaluation
questions –
Modules 1 - 3***

TELL participants to answer the questions related to Modules 1-3. They will turn in their responses prior to leaving for the day.

Opening - Day 2

Equipment, Materials, Supplies

- ☐ Newsprint, Easel, Markers, Masking tape
- ☐ White index cards, size 3" x 5", at least 10 per participant

Preparations

- ☐ Summarize Day 1 evaluations for class review. Consider making a slide with bar graphs showing number percent correct answer by answer (not by participant).

Room Arrangements

Round tables should be set up with six chairs placed in a semicircle around each table facing toward the front of the room.

Another table of any shape should be placed in the front of the room for the instructor.

An extra table may be placed at the back of the room to hold miscellaneous items and provide a space for observers to sit.

Place the white index cards in the center of each table.

Time/Materials Content/Activities

Opening

Response to Feedback from Day 1

15 minutes

TELL participants the result of Day 1 feedback. Consider posting their comments or making a slide. Indicate what you will improve, and what will be sustained, based on their feedback

Evaluation summary

Evaluation review

RETURN evaluation sheets to participants

Participant evaluation sheets from Day 1

SHARE results of class evaluation.

DISCUSS any questions that got low correct scores, or any responses participants continue to have questions about.

Logistics

ANSWER any questions participants might have.

Ground rules list

Ground Rules and Participant Expectations

REVIEW ground rules. Give participants the chance to modify the ground rules.

Preview Day 2

TELL participants that today we will cover modules 4 – 8.

15 minutes

- Module 4 - Coach as Facilitator
- Module 5 - Coach as Trainer
- Module 6 - Understanding Team Roles
- Module 7 - Establishing a Positive Team Climate
- Module 8 - Conducting Effective Meetings.

***Expectations
list***

Expectations

***Index cards,
tape***

REVIEW the expectations list. Indicate which items should be addressed today.

ASK participants to write down any additional expectations they have for today, using the white index cards.

ASK participants to attach their cards with masking tape to the expectations list.

REVIEW these learning needs with the group and tell them which topics will and will not be covered. Plan to modify your work to address individual or group learning needs and interests

Module 4: Coach as Facilitator

Preparation

Review Reference Manual

Equipment, Materials, Supplies

- ☐ Newsprint, Easel, Markers, Masking Tape

Exercise Preparation

- ☐ Review *Exercise 4-1: Four-Step Approach to Group Process Intervention*.
 - ☐ Prepare examples from your own experience or on the QA topic you are training on so participants can practice using this 4-step approach .
- ☐ Review *Exercise 4-2: Facilitation Guidelines*

Room Arrangements

Participants should be seated at tables in groups of 4 people.

Overview

Purpose

The purpose of this module is to present an overview of the major roles of the coach as facilitator and to provide an opportunity for participants to practice facilitation skills.

Objectives

At the end of this module participants will be able to:

- Define facilitation.
- Demonstrate a four step approach to group process intervention
- Discuss six facilitation guidelines.
- Assess the degree of self-knowledge they have regarding their role as facilitator.

<i>Content</i>	<i>Time</i>
Introduction	5 minutes
What is Facilitation?	10 minutes
Making Process Observations	15 minutes
Effective Questioning	10 minutes
Feedback About Group Process	15 minutes
Facilitation Guidelines	40 minutes
Self-awareness	10 minutes
Total time: 1 hour and 45 minutes	

Time/Materials Content/Activities

Introduction **DISCUSS** the purpose, objectives, and overview of the content, including a preview of training methods to be used

5 minutes

Purpose

OV 4-1

TELL participants the purpose of this module is to present an overview of the major role of the coach as facilitator and to provide an opportunity for participants to practice facilitation skills.

OV 4-2

Objectives

PREVIEW the objectives from the reference manual.

OV 4-3

Overview

PREVIEW the module contents.

TELL the participants they will have an opportunity to practice a 4-step approach to providing feedback about group process, to discuss facilitation guidelines in difficult situations, and to reflect on their skills as a QA coach facilitator.

What is Facilitation?

DISCUSS the material from the reference manual which defines what a coach will do with a team, and what interventions a coach may make

10 minutes

ASK 2 or 3 participants to comment on these definitions and activities..

**OV 4-4, 4-5,
4-6**

Making Process Observations

EXPLAIN what it means to make a process observation, based on reference manual information..

GIVE EXAMPLES of what a facilitator may observe in a team.

15 minutes

OV 4-7

- Forming: a new member joins a team.
- Storming: a team is spending considerable amount of time arguing over how to proceed with their tasks.
- Norming: the team is consistently agreeing with each other without critical examination of various points of view.
- Performing: the team is getting their work done effectively.
- Closing: a team is about to complete a major task.

ASK participants to suggest possible facilitation tools/techniques that could be used for these examples (based on stages of team development). Refer to the Reference Manual.

Effective Questioning

DISCUSS information from the Reference Manual, emphasizing the following points.

10 minutes

OV 4-8

- The primary purpose of questioning is to encourage people to **think**.
- By answering questions the team is encouraged, even forced, to maintain the initiative.
- A caution to coaches about the use of questions is not to play a guessing game with their teams.

ADD the following information:

- Effective questions are open –ended (not yes/no).
- When looking for a definitive answer, effective questions are specifically stated
- When trying to broaden thinking, questions can be asked several times on the same topic, using different forms and wording
- Effective questioners use follow-up questions to achieve clarity and enhance understanding.
- Effective questions may not end with a question mark – they may begin “tell me more about ...” or “please explain more about”

ASK participants to give an example of an effective question related to this material.

How To Give

DISCUSS information from the Reference Manual, emphasizing the

Feedback About Group Process

15 minutes

OV 4-9

OV 4-10
though 4-14

**Exercise 4-1:
Four step
approach to
group process
interventions**

following points.

- The coach and the team leader need to plan **how** feedback will be given
- Regardless of how the coach gives feedback (directly to the team or via the team leader) the approach to giving feedback must be:
 - Supportive of the team leader.
 - Supportive of the team.
 - Focused on the goals.

Exercise 4-1: 4-step approach to group process interventions

DISCUSS the 4-step approach to group process interventions, using the sheet *Exercise 4-1: 4-step approach to Group Process Interventions*

EXPLAIN that this is a framework for guiding the intervention

PRESENT an example from your own experience similar to the one on the exercise sheet. **ASK** participants to write down and tell the class what they would say, using this 4-step approach. You also may develop an example using the ideas in the "To handle . . . Try this" table in the Reference Manual.

Facilitation Guidelines

40 minutes

OV 4-15, 4-16

**Exercise 4-2:
Facilitation
Guidelines**

TELL participants to look at their *Reference Manuals, Module 4, pages 4-8 to 4-13*, or *Exercise 4-2: Facilitation Guidelines*

DISCUSS the facilitation guidelines. **EXPLAIN** what each guideline means and **CLARIFY** the content of the guidelines.

Exercise 4-2: Facilitation Guidelines

INTRODUCE the exercise.

- **TELL** participants that purpose of this exercise is to study one of the facilitation guidelines in depth.
- **TELL** participants to use the sheet *Exercise 4-2: Facilitation Guidelines*
- **TELL** participants to form 6 small groups, preferably 4 to a group
- **ASSIGN** one guideline to each group
- **TELL** each group to assign a team leader, coach, recorder and timekeeper as described in the exercise.

CONDUCT the exercise.

- **HELP** participants to follow the directions on the exercise sheet.
- **STOP** the work after 15 minutes.
- **TELL** each recorder to report the case scenario they developed and their decision of how to deal with such a situation.
- **SOLICIT COMMENTS** from other groups on the way the team

chose to deal with the situation

- **PROVIDE FEEDBACK** to correct or expand upon the choice of actions to deal with the stated problem. Refer to the Facilitation Guidelines tables in the Reference Manual as needed.

SUMMARIZE the exercise after all 6 group have reported

- **ASK** the team leaders and coaches to report whether they were able to follow the guidelines
- **ASK** the coaches for any comments about group process.
- **ASK** for feedback about whether the team thinks they would be able to follow these guidelines in real work.

**Self-
awareness**

10 minutes

**OV 4-17, 4-18,
4-19**

DISCUSS the following information from the Reference Manual.

- The key ingredient of a successful facilitator is the degree of knowledge the coach has about him- or herself. The facilitator must be willing to honestly answer the following questions:
 - How sensitive am I to the needs of others?
 - How approachable, pleasant, or positive do others perceive me to be?
 - Do I listen and communicate openly?
 - Do I work well with others?
 - Do I believe in QA?
 - Am I willing to be wrong or to lack knowledge?
 - Am I willing to learn about myself as well as about how to support teams?
 - Am I willing to have my priorities become second to the priorities of the team or team leader?

Transition

REVIEW the module objectives and link this material to the next module.

Exercise 4-1: Four-Step Approach to Group Process Intervention

1. Give the team feedback on the observed behavior.

“When the leader stated that she believed everyone supported improvement C, I noticed that some team members exchanged what appeared to me to be puzzled glances.”

2. Describe the potential or actual effect of the behavior.

“As you know without true consensus we may have trouble implementing the solution.”

3. Ask the team for input.

“Is there something else that needs to be discussed or have we achieved consensus?”

4. Ask the team to decide on action.

“What would the team like to do now?”

Exercise 4-2: Facilitation Guidelines

Overview of the Exercise

The purpose of this exercise is to study one of the facilitation guidelines in depth. You may also want to use pages 4-8 to 4-13 in your reference manual. Each of six small groups will be assigned one guideline, and will report their deliberations to the large group.

Each group member will think about the group's facilitation guideline and recall a specific situation they have experienced for which this guideline would be appropriate. Members will share these ideas with the group, and the group will choose one person's example, or possibly combine several examples and develop a case scenario for this guideline.

After describing and writing the case scenario, each group will discuss the possible ways to deal with the situation and agree on which one would be appropriate.

Each group will choose a team leader for this exercise. The team leader will read the following instructions and be responsible for making sure the exercise is completed.

Instructions for Each Group

1. Choose one person to be the recorder. The recorder will write the case scenario, record the team's decision on how to handle a similar situation in the future, and report back to the large group.
2. Choose one person to be the timekeeper. This person will follow the suggested timeframe and make sure the group begins and ends on time.
3. Choose one person to be the coach who will act as facilitator who will observe the group process and follow the four-step approach to group process interventions to help the group complete this exercise.
4. The time frame is as follows
 - Take 2 minutes to individually read the guideline and examples of possible situations, and recall a past experience.
 - Take 5 minutes for the group to discuss each person's past experience and decide which one to use for the case scenario.
 - There will be 5 minutes to discuss the possible ways to deal with the situation and agree on which one(s) would be appropriate.

Facilitation Guideline #1

FACILITATOR STAYS NEUTRAL IN THE TEAM

Situation

Think of a specific group situation that caused you to take sides. Examples:

- You felt ownership in the process.
- Specific questions were directed at you.
- You were asked to referee.
- You strongly believed you knew the answer to the problem.
- There was group silence.

Document your Case Scenario – (Recorder - Use the back of this sheet to write the team's chosen case scenario.)

What was the topic of the situation?

What happened?

How to deal with it

Discuss the following ideas and decide how you as facilitator would deal with this specific situation in the future. Check one that your entire group agrees with.

- ☐ Do not facilitate a team when you are leading it or when you feel ownership in the process. Assign someone else to be the facilitator.
- ☐ Open questions up to team; direct questions back to the team.
- ☐ Stay quiet (just inject information about process).
- ☐ Encourage participation. Allow members to respond with ideas and suggestions before you give your input.
- ☐ Establish ground rules.
- ☐ Allow process/team to work.
- ☐ Be patient.
- ☐ Announce that you feel strongly about the situation and wish to offer an opinion or make a decision before the team has had input.
- ☐ Other, please elaborate.

Facilitation Guideline #2

ENCOURAGE PARTICIPATION BY ALL

Situation

Think of a past situation in which team members were not fully participating. You may have noticed the following:

- Silence.
- Dominance by one person, perhaps the leader, but also may be other members.
- Logistics blocks interaction.
- Team fear of supervisor on team.
- “Groupthink” - Everyone blindly agrees with a dominant person.

Develop Your Case Scenario - (Recorder - Use the back of this sheet to write the team’s chosen case scenario.)

What was the topic of the situation?

What happened?

How to deal with it

Discuss the following ideas and decide how you as facilitator would deal with this specific situation in the future. Check one that your entire group agrees with.

- ☐ Ask easy questions of team members.
- ☐ Rearrange seating.
- ☐ Talk privately with leader if s/he is the dominating person – focus on goals, not individual behavior.
- ☐ Talk to manager or supervisor.
- ☐ Thank members for contribution and ask others what they think.
- ☐ Establish participation as a ground rule in first meeting! (In order for group to be successful, everyone must participate).
- ☐ Work for consensus (ask team leader ahead of time to get consensus from each person at each decision point).
- ☐ Use energizers.
- ☐ Other, please elaborate.

Facilitation Guideline #3

HELP TEAM REACH CONSENSUS

Situation

Think of a past situation in which reaching consensus would have been important. Examples might be:

- When a decision or action, no matter how small, was necessary.
- When there was disagreement.
- When there was silence.
- When there was a lack of non-verbal agreement.

Develop Your Case Scenario - (Recorder - Use the back of this sheet to write the team's chosen case scenario.)

What was the topic of the situation?

What happened?

How to deal with it

Discuss the following ideas and decide how you as facilitator would deal with this specific situation in the future. Check one that your entire group agrees with.

- ☐ Use a provocative statement, or play devil's advocate, to probe the limits of apparent consensus.
- ☐ Find common ground.
- ☐ Use a second-best decision-making approach such as voting or decision matrix.
- ☐ Use QA tools – agree on root cause, clarify a process, force field analysis.
- ☐ Use process – enhance open communication, effective feedback.
- ☐ Focus group on common purpose or goals of a decision.
- ☐ Ask for compromise options.
- ☐ Deflect attention from subjective to objective.
- ☐ Identify to group that they're floundering (i.e. stop/pause and get group to identify and resolve barriers).
- ☐ Other, please elaborate.

Facilitation Guideline #4

REFLECT FEELINGS AND IDEAS BACK TO THE TEAM

Situation

Think of a time when reflecting feelings and ideas would have been important. Examples include when:

- The team wanted you to make a decision.
- The team lost its train of thought.
- There was a need to clarify issues.
- When there was a need to summarize.

Develop Your Case Scenario - (Recorder - Use the back of this sheet to write the team's chosen case scenario.)

What was the topic of the situation?

What happened?

How to deal with it

Discuss the following ideas and decide how you as facilitator would deal with this specific situation in the future. Check one that your entire group agrees with.

- ☐ Ask clarifying question.
- ☐ Call time out; do process audit (validate “What I seem to hear is ...”).
- ☐ Ask open-ended questions.
- ☐ Speak to people individually.
- ☐ Don't become a counselor for group.
- ☐ Work with and through the leader – arrange a secret signal that will tell the leader you have something important that he or she should address.
- ☐ Other, please elaborate.

Facilitation Guideline #5

HELP TEAM KEEP ITSELF ON TRACK

Situation

Think of a situation where it would have been appropriate to emphasize team monitoring. Examples may include the following

- Team was experienced, not in a forming stage.
- Team drifted off task.
- Deadlines were not met, reports were not prepared, members were not ready when the meeting started.

Develop Your Case Scenario - (Recorder - Use the back of this sheet to write the team's chosen case scenario.)

What was the topic of the situation?

What happened?

How to deal with a team that falls away from its goals.

Discuss the following ideas and decide how you as facilitator would deal with this specific situation in the future. Check one that your entire group agrees with.

- ☐ Stick to process (refocus team) with reflective feedback.
- ☐ Clarify that goals are still desired and important (validate the purpose of an intended improvement).
- ☐ Clarify timelines.
- ☐ Clarify individual and team responsibilities.
- ☐ Make things visible (use flip chart).
- ☐ Summarize where team has been and is going.
- ☐ Ask team members to advise how they would get back on track.
- ☐ Allow distracting discussions to go on only for about 5 minutes and then call team to task – use the “secret signal” with the team leader to encourage the leader’s role in taking action to get back on track
- ☐ Other, please elaborate.

Facilitation Guideline #6

EXPECT A GREAT DEAL OF PAIN

(i.e. even if you know the answer, let team handle the problem)

Situation

Think of a situation in which you wanted to take charge. Examples might include

- You know the answer and the group is stumbling.
- The team has taken the work in a direction you did not anticipate.
- The team asks you for answers.

Develop Your Case Scenario - (Recorder - Use the back of this sheet to write the team's chosen case scenario.)

What was the topic of the situation

What happened?

How to deal with not taking over.

Discuss the following ideas and decide how you as facilitator would deal with this specific situation in the future. Check one that your entire group agrees with.

- ☐ Let group work out answers.
- ☐ Stick with group process.
- ☐ Endure, endure, endure.
- ☐ Trusts in the process – for example, if you selected an approach to developing an action plan, and it works, don't change the approach! Stick with it.
- ☐ Let group try longer.
- ☐ Other, please elaborate.

Module 5: The Coach as a Trainer

Preparation

Review Reference Manual

Equipment, Materials, Supplies

- ☐ Newsprint, Easel, Markers, Masking Tape

Exercise Preparation

- ☐ Review *Exercise 5-1: Advantages and Disadvantages of JITT*
- ☐ Review *Exercise 5-2: Planning Sheet for Conducting Competency-Based, Just-in-Time Training*
- ☐ Review *Exercise 5-3: Components of a Competency-Based, Just-in-Time Training Session*

Room Arrangements

Participants should be seated at tables with enough room to work individually.

Overview

Purpose

The purpose of this module is to introduce key principles of competency-based, just-in-time training and provide participants with an opportunity to plan a training session on QA and team building topics.

Objectives

At the end of this module team members will be able to:

- Discuss the role of the coach as a trainer.
- Describe the key features of competency-based, just in time training.
- Plan a competency-based, just in time training session.

Content	Time
Introduction	5 minutes
Competency-Based Training	15 minutes
Just-in-Time Training	15 minutes
Creating and Maintaining a Positive Team Training Environment	15 minutes
Instructional Design for Competency-Based, Just-in-Time Training	60 minutes
Documentation of Training	10 minutes
	Total time: 2 hours

Time/Materials Content/Activities

Introduction

Purpose

5 minutes

TELL participants the purpose of this session is to introduce key principles of competency-based, just-in-time training and provide participants with an opportunity to plan a training session on QA and team building.

OV 5-1

Objectives

OV 5-2

PREVIEW objectives from the reference manual

OV 5-3, 5-4

Overview

PREVIEW module content. Explain the last section, on interactive training techniques, will not be covered in detail but the information is in the reference manual.

Competency-Based Training

Training compared to education

15 minutes

EXPLAIN to participants the difference between training and education, based on reference manual information.

OV 5-6

OV 5-7

The goals of QA training and team building

Explain the goal of QA training and the goal of team building

OV 5-8 **DISCUSS** competency-based training principles from the reference manual

OV 5-9 **EXPLAIN** the three stages of competency-based learning as discussed in the reference manual.

Just-in-Time Training

EXPLAIN the definition and characteristics of just-in-time training, based on reference manual information. These are key points:

15 minutes

OV 5-10, 5-11

- a focus on knowledge and skill specifically required to do a task (not broad background knowledge).
- immediate application of the new knowledge and skill.
- conducted in conjunction with team work – no extra time away from the job, or away from team work
- in response to specific needs of specific teams.
- focused on “need to know” rather than “nice to know” material.

ASK one participant to give an example of just-in-time training they have conducted or received.

REVIEW the characteristics of just-in-time training using the participant's example.

Exercise 5-1: Advantages and disadvantages of JITT

Exercise 5-1: Advantages and disadvantages of JITT

INTRODUCE the exercise.

- **TELL** participants to use *Exercise 5-1: Advantages and disadvantages of JITT*
- **DIVIDE** the group into half.

CONDUCT the exercise.

- **TELL** one half of the group to think about advantages of just-in-time training and to share their thoughts with a person sitting next to them.
- **TELL** the other half to think about disadvantages and to share their thoughts with a person sitting next to them.
- Starting with the half who discussed advantages, **ASK** for one person in each pair to state their ideas.
- **RECORD** their responses on a flip chart.
- **ASK** the other half who discussed disadvantages and ask for one person in each pair to state their ideas.
- **RECORD** their responses on a flip chart.

SUMMARIZE the exercise.

OV 5-12

- **ADD** any key advantages or disadvantages that have not been mentioned (found in the reference manual)
- **TELL** participants that because of the advantages of just-in-time training, this strategy is the focus of this module and the training program.
- **TELL** participants that, as with any group process, the coach must consult with the team leader to decide who will provide just-in-time training, when it should be conducted, and what skills should be taught.

Creating and Maintaining a Positive Training Climate**15 minutes****OV 5-13**

DESCRIBE how a coach can create a positive training climate, based on reference manual information

ASK participants to brainstorm characteristics of how adults learn. Encourage them to think about their own personal learning preferences

ASK at least 6 people to state their own personal preferences.

OV 5-14, 5-15

LIST the responses on newsprint. **ADD** any missing items, based on reference manual information.

DESCRIBE how a coach can use this knowledge about how people learn to improve training

OV 5-16, 5-17

DESCRIBE how an atmosphere of safety can be created, based on reference manual information

OV 5-18, 5-19, 5-20

DISCUSS how responsibility for accomplishing training objectives is shared between the team, team leader, and coach, based on reference manual information.

ASK participants to give examples from their own experience of creating an atmosphere of safety, and sharing responsibility with team members for accomplishing training objectives. (**GIVE** one example of each from your own experience to start the discussion, if needed).

OV 5-21 through 5-26

DISCUSS AND GIVE EXAMPLES of using appropriate verbal and nonverbal communication. You may use examples from the

reference manual.

OV 5-27

PRESENT additional information from the Reference Manual on the following topics

- The use of humor
- Informal learning.
- Additional formal training.

Instructional Design For Competency-Based, Just-In-Time Training

Exercise 5-2: Planning Worksheet on Conducting Competency-based, Just-in-time Training

DESCRIBE just-in-time training, based on reference manual information.

5 minutes

OV 5-28

INTRODUCE the exercise

Exercise 5-2: Planning Worksheet on Conducting Competency-based, Just-in-time Training

- **TELL** participants that the purpose of this exercise is to practice planning a competency-based, just-in-time training session.
- **EXPLAIN** that this exercise will be done during the rest of this module (discussion will be interspersed with exercise).
- **EXPLAIN** that this exercise is done individually.
- **EXPLAIN** that regardless of whether one is planning a 5-minute training intervention or a 5-day training program, there are key steps to complete to make the training relevant and competency-based.
- **EXPLAIN** that the Planning Worksheet will be used during this session and may be used when participants return home to prepare for training.
- **TELL** participants to take out *Exercise 5.2: Planning Worksheet for Conducting Competency-Based, Just-in-Time Training*.
- **ASK** participants to read both scenarios and choose one to use for this practice exercise. Alternatively, participants may choose another scenario that is based on an actual team with whom they are working. (3 minutes)
- **ASK**, "Are there any questions?"

Assessment of Need

PRESENT the information from the reference manual. Be sure to cover these important topics:

15 minutes

OV 5-31

- The purpose of needs assessment
- Different way trainers may determine training needs

CONDUCT the exercise

**Exercise 5-2:
Planning
Worksheet on
Conducting
Competency-
based, Just-in-
time Training**

- **TELL** participants to complete Questions 1 a. and 1b. under Assessment on the Planning Worksheet. (3 minutes)
- **Privately, ASK** each participant to state his or her answers to Question 1. Check that each participant has focused on a specific behavior or competency to work on.
- For each scenario **ASK** one participant if he or she would be willing to share their answers to both questions 1 and 2, so you can provide relevant feedback that will help the entire group.

**Presentation of
New
Information and
Skill**

20 minutes

OV 5-32

PREVIEW information from the reference manual.

- The components of an effective presentation
 - An **introduction** that includes the purpose of the training and a demonstration or example of the skill to be learned.
 - Presentation of new knowledge and skill using **interactive training methods**.
 - A **summary** that includes time for reflection, review of main points, and feedback to provide reinforcement for correct actions and remediation of incorrect ones.

OV 5-33

Introduction

PRESENT information about an introduction from the Reference Manual.

CONDUCT the exercise

**Exercise 5-2:
Planning
Worksheet on
Conducting
Competency-
based, Just-in-
time Training**

- Ask participants to complete Question 2a of the Planning Worksheet. (3 minutes)
- **Privately, ASK** each participant to state his or her answers to Question 2a.
- For each scenario **ASK** one participant if he or she would be willing to share their answers so you can provide relevant feedback that will help the entire group

Presentation of new knowledge and skills

OV 5-35

DISCUSS that lecture is a poor way to present QA knowledge and skills. Interactive training combines input modes and involves learners.

OV 5-36

PRESENT information about interactive training methods from the Reference Manual.

OV 5-37

**OV5-38
through 5-43**

- **EXPLAIN** that there is not enough time to discuss each of the methods. Most of the methods are incorporated in this training program and participants will learn about them through observation and direct participation. Also, in the final training workshop each participant will have the opportunity to present a competency-based, just-in-time training session using one or more of these methods. However, you may spend time on the use of visual aids – newsprint - and effective questioning since both are used in virtually all training activities.

**Exercise 5-2:
Planning
Worksheet on
Conducting
Competency-
based, Just-in-
time Training**

CONDUCT the exercise

- **ASK** participants to answer Question 2b on the Planning Worksheet. (3 minutes)
- **Privately, ASK** each participant to state his or her answers to Question 2b.
- For each scenario **ASK** one participant if he or she would be willing to share their answers so you can provide relevant feedback that will help the entire group.

Summary

OV 5-44

PRESENT information from the Reference Manual about how to summarize a training session.

**Exercise 5-2:
Planning
Worksheet on
Conducting
Competency-
based, Just-in-
time Training**

CONDUCT the exercise

- **ASK** participants to answer Question 2c on the Planning Worksheet. (3 minutes)
- **Privately, ASK** each participant to state his or her answers to Question 2c.
- For each scenario **ASK** one participant if he or she would be willing to share their answers so you can provide relevant feedback that will help the entire group

Evaluation

PRESENT information from the Reference Manual on evaluation.

15 minutes

EMPHASIZE the focus on performance – not what the team member “understands” but rather what the team will do.

**OV 5-45
OV 5-46**

EMPHASIZE that that the outcome is defined in terms of the team's work. Give an example.

OV5-47

DISCUSS ways to measure performance to conduct evaluation, based on reference manual information

based on reference manual information

CONDUCT the exercise

**Exercise 5-2:
Planning
Worksheet on
Conducting
Competency-
based, Just-in-
time Training**

- Ask participants to complete Question 3a on the Planning Worksheet. (3 minutes)*
- **Privately, ASK** each participant to state his or her answers to Question 3a.
- For each scenario **ASK** one participant if he or she would be willing to share their answers so you can provide relevant feedback that will help the entire group.

SUMMARIZE the exercise

- **REVIEW** the key elements of assessment, presentation and evaluation
- **EMPHASIZE** that they will need to include these elements in planning their practice presentation during the Training Workshop on the last day of class

Trainer Notes

5 minutes

**Exercise 5-3:
Components of
a Competency-
Based, Just-in-
Time Training
Session**

TELL participants to look at *Exercise 5-3: Components of a Competency-Based, Just-in-Time Training Session*

DISCUSS that the trainers notes (the example on the exercise sheet of creating an agenda) detail each of the three elements of competency-based JITT – assessment, presentation and evaluation.

TELL participants they will develop trainers notes to guide their Training Workshop session, and the notes must be modeled after the example, showing the 3 components of the session.

REVIEW the exercise sheet as a job aid for help in organizing the notes.

**Documentation
of Training**

10 minutes

**OV5-48
through 5-51**

PRESENT information from the Reference Manual on

- Purpose of documentation
- Training reports
- Training materials

MODIFY the information based on the relationship of the audience to the QA Project requirements.

Transition

REVIEW module objectives and link them to the next module.

Exercise 5-1: Advantages and Disadvantages of Just-in-Time Training

The trainer will ask the group to divide in half.

One half will brainstorm the advantages of just-in-time training.

The other half will brainstorm the disadvantages of just-in-time training.

Exercise 5-2: Planning Worksheet for Conducting Competency-Based, Just-in-Time Training

Choose one scenario to use when developing a competency-based, just-in-time training intervention.

☐ **Scenario 1: QA skill**

Imagine yourself as a QA coach working with a team on process redesign. At the end of a meeting a task for the next meeting is set - to develop a flow chart for a particular process. You overhear one member saying he has forgotten how to draw a flow chart. At the next meeting you observe several members using different symbols for the same function and a general sense of confusion exists.

☐ **Scenario 2: Team building skill**

You are working as a coach with a team that is meeting for the third time. The team's task is to use standards for newborn care, which were recently revised, and develop indicators to measure individual compliance with them. The first meeting was friendly and informative, but in the last two meetings the team did not make progress because people were arguing about whether the standards applied to workers in health centers as well as workers in hospitals.. As a result, they have not developed any indicators..

1. Assessment

- a. What does the team have to know and be able to do in order to accomplish the task?

- b. How did you determine this need?

☐ Informal discussions ☐ formal assessment; ☐ observation; ☐ new task;
☐ team's stage of development; ☐ request for training

2. Presentation of New Knowledge and Skill

- a. What could you demonstrate or what example could you provide to model the needed skill?

b. What method(s) will you use to teach the new knowledge or to practice the skill?

☐ Visual aid / Newsprint

☐ Case study

☐ Questioning

☐ Role play

☐ Illustrated lecture

☐ Brainstorming

☐ Small group activity

☐ Group discussion

c. What questions could you ask that would provide an opportunity for the team to reflect on or review what they have learned?

3. Evaluation

a. How will you know if the team has acquired this skill — what behavior will provide evidence that this skill has been acquired? Be sure to state the outcome in terms of the team's work.

Exercise 5-3: Components of a Competency-Based, Just-in-Time Training Session

An effective training intervention incorporates:

- An **INTRODUCTION** that includes the purpose of the training and a demonstration or example of the skill to be learned.
- **PRESENTATION OF NEW KNOWLEDGE AND SKILL** using interactive training methods.
- A **SUMMARY** that includes time for reflection, review of main points, and feedback to provide reinforcement for correct actions and remediation of incorrect ones.

Example: Creating an Agenda

Trainer Notes

Objective: The team will develop an agenda for the next team meeting.

- | | |
|-------|---|
| 10:00 | Introduction: “I would like to review the four components of an agenda.” |
| 10:02 | Demonstration: Pass out an example of an agenda. Ask if the team can identify the four components. List them on newsprint - Time, Topic, Purpose, and Person Responsible. |
| 10:10 | Practice - Small group activity: Ask the team to form pairs. Each pair will develop a draft agenda for the next meeting. |
| 10:15 | Summary - Reflection: Ask the team what advantages they perceive in having a meeting agenda. Ask if there are any disadvantages.

Summary: Review the four components of an agenda. |
| 10:20 | Closing statement: “Having an agenda has advantages that generally outweigh the disadvantages, particularly if each of the four components are included and agendas are prepared and distributed in advance.” |

Evaluation: The team develops an agenda with each of the four components for subsequent meetings.

Develop trainer notes for your practice training session

10:00 Introduction - Objective:

10:02: Introduction - Demonstration or Example:

10:10 Present background information and opportunity for practice using an interactive training technique:

10:15 Summary - Reflection:

Summary - Review

Summary - Feedback

10:20 Closing statement:

How will you know if this skill has been acquired?