Opening - Day 4

Equipment, Materials, Supplies

❑   Newsprint, Easel, Markers, Masking tape

❑   White index cards, size 3" x 5", at least 10 per participant

Preparations

❑   Summarize Day 3 evaluations for class review. Consider making 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 3*

15 minutes   **DISCUSS** any actions taken in response to Day 3 Feedback.

Evaluation   *Evaluation review*
summary
                            RETURN evaluation sheets to participants

Participant
evaluation   **SHARE** results of class evaluation.
sheets from Day
3   **DISCUSS** any questions that got low correct scores, or any questions participants continue to have questions about.

                            Logistics

                            ANSWER any questions participants might have.

                            Norms and Participant Expectations

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

Preview Day 4

15 minutes

Preview the purpose and objectives for

- Module 14 - Developing an Action Plan
- Module 15 - Facilitation Workshop
- Module 16 - Training Workshop

ASK participants to write down at least one thing that they would like to learn today that is not already on the expectations list - one thing on each white index card.

ASK participants to attach their cards with masking tape to newsprint.

REVIEW these learning needs with the group and tell them which topics will and will not be covered. This activity also can help the instructor focus the course on individual or group learning needs and interests.

Module 14: Developing an Action Plan

Preparation

Equipment, Materials, Supplies

❑ Newsprint, Easel, Masking Tape, Markers for instructor

❑ Several boxes of colored marker pens - one box for each table of participants

❑ Several sheets of 8 1/2" by 11" paper (different colors, if possible) - at least one sheet per participant

Exercise Preparation

❑ Review *Exercise 14: Action Plan.*

Room Arrangements

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

There should be wall space available to post 8 1/2" by 11" sheets of paper - one sheet of paper for each participant.

Overview

Purpose

The purpose of this session is to ensure the transfer of learning to the job when the participants return home. This session provides participants with an opportunity to reflect on what they have learned and to develop a list of action steps to take in the next six months.

Objective

At the end of this module participants will

- Develop a list of action steps to apply the knowledge and skills learned at the training to their work with teams at home.

Content	Time
Introduction	5 minutes
Action Plan	30 minutes
Illustration of One Action Step	10 minutes
Gallery Walk	15 minutes
	Total time: 60 minutes

Time/Materials   Content/Activities

Introduction

DISCUSS the purpose, objectives, and overview of the content.

5 minutes
Purpose

OV 14-1
TELL participants the purpose of this session is to ensure the transfer of learning to the job when the participants return home. This session provides an opportunity to reflect on what they have learned and to develop a list of action steps to take in the next six months.

Objective
OV 14-2

REVIEW the objective for the module, listed on the first page of these module notes.

Overview

OV 14-3
TELL participants they will have an opportunity to think about what they have learned and experienced during this training and develop an action plan to implement when they return home. The action plan should describe what they will do to use or practice their new coaching skills.

TELL participants they will create a picture that represents visually and symbolically one of their planned action steps. The session will end by hanging the illustrations around the room and having the participants take a "gallery walk" to view each other's plans.

Note to Instructor: Depending on the group, the plan of action may be developed in a self-directed manner with participants doing self-reflection and planning their own actions. Alternatively, the team may be directed by the trainer or (employer, supervisor, another

person who is in charge) as to the steps they will be taking.

Action Plan and Illustration

40 minutes

INTRODUCE the activity.

TELL participants they will work individually on this exercise.

ASK participants to think about the information they have learned in this training program. They may review their notes, exercises, training materials and their journal if one has been used throughout the training. They may use the planning steps presented in Module 11 – picture the future, assess the present, determine the gap, develop a plan to bridge the gap.

ASK the following questions to stimulate their thinking:

- "What did you hear, see, and pay most attention to during the training?"
- "What new ideas occurred to you?"
- "What have you been thinking about doing when you return to your job?"

CONDUCT the activity.

Exercise 14-1: Action Plan

OV 14-4

- **TELL** participants to take out *Exercise 14-1: Action Plan* and provide the following instructions
  - Complete the action plan. Write actions you plan to take within the next month, 1-3 months, and within the next 6 months that will allow you to use or practice your coaching skills. Be as specific as possible with details of who you will work with, when.
  - Participants will have 20 minutes to work individually on their plan.
- **STOP** participants at the end of 20 minutes
- **TELL** participants to choose one step to illustrate on a separate piece of paper. Draw a picture or design that symbolizes or represents this action on an 8-1/2" by 11" sheet of paper using the colored markers.
  - Participants will have 10 minutes to work on their illustrations.
- **STOP** participants after 10 minutes,
- **ASK** participants to hang their illustrations around the room.

Gallery Walk

15 minutes

SUMMARIZE this activity.

- Participants will have 15 minutes to take a "gallery walk" around the room to view each other's illustrations.
- **ASK** participants to say what their action step is and how they have chosen to illustrate it.

Exercise 14-1: Action Plan

Think about what you have learned in this training program. Refer to your participant manual and review your notes, exercises, and journal if you kept one.

Complete the following action plan. Write actions you plan to take within the next month, then the next one to three months, and within the next six months that will allow you to use or practice your coaching skills.

Choose one step to illustrate on a separate piece of paper. Draw a picture or design that symbolizes or represents this action.

Action Item	Actions to Be Taken Within One Month	Actions to Be Taken In the Next 1 To 3 Months	Actions to Be Taken in the Next 3 to 6 Months
Communication Skills Example: Positive feedback	Give positive feedback to each member of my team.	Train a team leader in giving positive feedback.	Train all team members in giving positive feedback.
Facilitation Skills			
Just-in-Time Training Skills			

Action Item	Actions to Be Taken Within One Month	Actions to Be Taken In the Next 1 To 3 Months	Actions to Be Taken in the Next 3 to 6 Months
People to Contact			
Reading to Do			
Exercises to Conduct			
Presentations to Make			

Action Item	Actions to Be Taken Within One Month	Actions to Be Taken In the Next 1 To 3 Months	Actions to Be Taken in the Next 3 to 6 Months
Other:			
Other:			

Module 15: Facilitation Workshop

Preparation

Equipment, Materials, Supplies

❑ Newsprint, Easel, Markers, Masking Tape

Room Arrangements

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

Exercise Preparation

❑ Review *Exercise 15: Team Development Needs*

Overview

Purpose

The purpose of this module is to enable participants to analyze team building needs using an assessment tool.

Objectives

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

- Administer a team development questionnaire.
- Discuss the differences between facilitation and training.

Content	Time
Introduction	5 minutes
Team Development Needs Exercise	55 minutes
Discussion	30 minutes
	Total time: 1 hour and 30 minutes

Time/Materials   Content/Activities

Introduction   DISCUSS the purpose, objectives, and overview of the content.

5 minutes	*Purpose*
OV 15-1	**TELL** participants the purpose of this module is to enable participants to analyze team building needs using an assessment tool.
OV 15-2	*Objectives*
	REVIEW module objectives found on the first page of these notes.

Overview

EXPLAIN that coaches need a way to assess a team's need for teambuilding activities. The instrument used in this module is a tool they can use to assess an existing team's development needs..

Team Development Needs

55 minutes

Questionnaire and scoring sheet for exercise

INTRODUCE the exercise.

- **TELL** participants the purpose of this exercise is to practice using an assessment tool to determine the need for team building.
- **TELL** participants that for this use, they may think of themselves as they operate in a current team or a previous team, but they should think of the same team throughout the exercise.
- **TELL** participants this questionnaire is not a scientific survey; it is meant to serve as a tool to provoke thought and discussion. Therefore, the quality of the result is directly related to respondents' openness when answering the statements.
- **TELL** participants they will work individually.

CONDUCT the exercise.

Newsprint example of scoring grid

- **EXPLAIN** the instructions found at the beginning of the exercise.
- **DEMONSTRATE** how to complete the scoring grid.
- **WATCH** the work and answer questions as needed.

SUMMARIZE the exercise.

OV 15-3, 15-4

- **DISCUSS** the Seven Team Blockages as found on the exercise sheet.
- **ASK** what interventions might be appropriate for a team experiencing each of the blockages. Encourage them to consider both training and facilitation interventions..

Exercise 15-1: Team Development Needs Questionnaire

Instructions:

As you read each of the statements in this questionnaire, consider whether or not it is descriptive of your team. If you believe that a statement is basically true, look at the answer sheet, find the box that contains that statement number, and mark an X through the number in that box. If you believe that the statement is not generally true for your team, leave the corresponding box blank on the answer sheet.

Example

1	2	3	4	5	6	7
8	9	10	11	12	13	14

Answer each statement as you read it. If you have great difficulty deciding whether or not a particular statement is true, use your best judgement and then write a question mark by the statement and in the corresponding box on the answer sheet; you may want to discuss these statements later with your team.

This questionnaire is not a scientific survey; it is meant to serve as a tool to provoke thought and discussion. Therefore, the quality of the result is directly related to your openness when responding to the following statements.

Statements

1. The leader and members of our team spend little time in clarifying what they expect and need from one another.

2. People in our team often are not really frank and open with one another.

3. We rarely achieve much progress in team meetings.

4. The objectives of some individual team members do not correlate with those of other members.

5. When team members are criticized, they often feel that they have lost face.

6. New members often are just left to find their own place in our team.

7. Our team does not generate many new ideas.

Adapted and reproduced from *Improving Work Groups: A Practical Manual for Team Building* (Revised) Dave Francis and Don Young San Diego, California: Pfeiffer & Company, 1992,. This material is used by permission of John Wiley & Sons, Inc.

8. Our team leader rarely tolerates leadership efforts by other team members.

9. In team discussion the members often hide their real motives.

10. When our team is having a meeting, the members do not listen to one another.

11. The team members are uncertain about their individual roles in relation to our team.

12. Members of our team often restrain their critical remarks to avoid "rocking the boat".

13. The potential of some team members is not being developed.

14. Members of our team are wary about suggesting new ideas.

15. Members of our team are uncertain of where they stand with our team leader.

16. It would be helpful if our team could have sessions to discuss disagreements more often.

17. Our team meetings often seem to lack a methodical approach.

18. There is no regular review of individual objectives and priorities.

19. Our team is not good at learning from its mistakes.

20. Members of our team tend not to show initiative in keeping up to date or in developing themselves.

21. We have the reputation of being resistant to change.

22. Our team leader gets little information about how the members of the team view his or her performance.

23. Important issues are often put aside and not worked through.

24. Our team members rarely plan or prepare for meetings.

25. If some of our team members are missing, their work just does not get done.

26. Attempts to review events critically are seen by our team as negative and harmful.

27. Our team seldom innovates anything.

28. Our team would reach better-quality decisions if team members took the initiative.

29. In our team there is too much emphasis placed on conformity.

30. Our team does not set aside time to consider and review how it tackles problems.

31. Much improvement is needed in communication among the members of our team.

32. Our team would benefit from an impartial assessment of how the members work.

33. Most of our team members have been trained only in their technical disciplines.

34. Good ideas seem to get lost.

35. Our team leader often makes decisions without talking them through with the team.

36. Differences between team members are rarely worked through properly.

37. We often seem to get bogged down when a difficult problem is being discussed in team meetings.

38. Our team does not have adequate administrative resources and procedures.

39. We lack the skills to review our effectiveness constructively.

40. New ideas from outside our team are seldom accepted.

41. Our team leader does not adapt his or her style to changing circumstances.

42. Individuals in our team do not really get to know one another as people.

43. We have team meetings but do not properly examine their purpose.

44. We function in a rather rigid manner and are not sufficiently flexible in using team resources.

45. Our team's performance would improve if constructive criticism were encouraged.

46. Members of our team who are shy or uncertain are often overridden.

47. It would be fair to say that our team has little vision.

48. Our team leader is not sufficiently sensitive to the different needs of each team member.

49. There are cliques and political maneuvering in our team.

50. Decisions made at meetings are not properly recorded or activated.

51. Team members could collaborate much more if they examined the possibilities of doing so on a person-by-person basis.

52. Little time is spent on reviewing what our team does, how it works, and how to improve the team.

53. Anyone who questions established practices in our team will be quickly put in his / her place.

54. Only a few team members suggest new ideas.

55. I do not know whether our team is adequately represented at higher levels.

56. Disagreements between members of our team are seldom worked through thoroughly, and individual viewpoints are not fully heard.

57. Our team meetings do not properly resolve all the issues that should be dealt with.

58. We do not examine how our team spends its time and energy.

59. We make resolutions, but basically we do not learn from our mistakes.

60. Our team members often do not follow creative ideas through to definite action.

Team Development Needs
Answer Sheet

Instructions:

If you believe that a statement is basically true, mark an X through the number in that box.

If you believe that the statement is not generally true for your team, leave the corresponding box blank on the answer sheet.

After you have responded to all statements according to the instructions on the questionnaire, count the number of X's in each vertical column and write the totals in the appropriate boxes in the "Totals" row. The total for each vertical column (A through G) should be some number between zero and nine. The categories with the highest scores might be areas to focus team building efforts.

	1	2	3	4	5	6	7
	8	9	10	11	12	13	14
	15	16	17	18	19	20	21
	22	23	24	25	26		27
	28	29	30	31	32	33	34
	35	36	37	38	39		40
	41	42	43	44	45	46	47
	48	49	50	51	52	53	54
	55	56	57	58	59		60
TOTAL							
	A	B	C	D	E	F	G

Team Development Needs
Interpretation Sheet

Instructions:

When you have totaled all X's in the seven vertical columns on the answer sheet (labeled with letter "A" through "G"), transfer each total to the "My Score" column of the following grid, next to the appropriate letter of the alphabet. Each of the lettered columns on the answer sheet represents 6-9 questionnaire statements, all of which concern a particular team problem. For example, questionnaire statements 1, 8, 15, 22, 28, 35, 41, 48 and 55, which form the vertical column labeled "A" on the answer sheet, all have to do with *team roles*.

When an existing team uses this as an assessment tool, calculate the average score for each letter category. The category with the largest number is the one the team needs to work on. The coach may take on the role of facilitator or trainer to address these problems.

Letter	My Score	Group Average	Three priority Topics	Category
A				Team roles
B				Climate
C				Organizing Meetings
D				Working in Teams
E				Feedback
F				Individual Development
G				Creativity

Summary of the Seven Team Blockages

A. Team Roles: The team leader is seen as unable and/or unwilling to use a team approach and does not encourage the use of team-building activities. He or she often uses a "command" decision style rather than a "consensus" decision style. The leader does not share his or her power of leadership responsibilities. Team members are not qualified (professionally or socially) to contribute to the team and thus do not help it to achieve its goals.

B. Climate: The team's climate discourages members from feeling comfortable, from being direct and open, and from taking risks. Team members are not committed to the aims and purposes of the team and are reluctant to expend personal energy on meeting the team's goals.

C. Organizing Meetings: Problems that are faced by the team are not solved effectively and efficiently. Meetings lack purpose or direction. The team may not understand its objectives.

D. Working in Teams: Team members' roles are not clearly defined, efficient communication procedures have not been developed, and administrative procedures are not supportive of the team's efforts.

E. Feedback: In order not to upset team members, neither group nor individual errors and weaknesses are addressed directly and thoroughly enough so that they are eliminated.

F. Individual Development: Team members have not developed the maturity and confidence needed to be assertive or to deal with other members' strong personalities.

G. Creativity: Team members do not generate new ideas, perhaps because risk taking is not encouraged and rewarded by the organizational climate.

Module 16: Training Workshop

Preparation

Equipment, Materials, Supplies

❑ Newsprint, Easel, Markers, Masking Tape

Exercise Preparation

❑ Ensure a sufficient number of instructors are available so each has no more than 9 participants to watch during practice teaching (max. 3 hours @ 20 min teaching each)

❑ Review *Exercise 16-1: Practice Training Session Review Sheet.*

    ❑ Make at least 6 extra copies of the Review Sheet for each participant.

❑ Review materials from *Exercise 3-4 Feedback Guidelines, Corrective and Supportive Feedback Guidelines.*

Room Arrangements

There should be a table in the front of the room for the person delivering their training session and for 4 participants who are acting as team members to receive the training.

If there are more than 9 participants, you need additional rooms for practice teaching.

The remaining participants should be seated at tables. They should be able to see and hear clearly the practice training session being delivered.

Overview

Purpose

The purpose of this module is to develop participants' skills in delivering competency-based, just-in-time training.

Objectives

At the end of this module participants will be able to

- Deliver an example of competency-based, just-in-time training.

Content	Time
Introduction	5 minutes
Practice Delivering Competency-based, Just-in-Time Training Sessions	20 minutes per participant
	Total time: 3 hours

Time/Materials   Content/Activities

Introduction

DISCUSS the purpose, and objectives of this modules.

5 minutes

Purpose

OV 16-1

TELL participants the purpose of this module is to develop participants' skills in delivering competency-based, just-in-time training.

Objectives

OV 16-2

DISCUSS the module objective, on page one of these notes.

Practice Presentations

DIVIDE participants into smaller groups for the practice training sessions. There must be one instructor for each training workshop to facilitate giving and receiving feedback. The maximum number of participants per instructor is 9 people.

20 minutes per participant

REVIEW *Exercise 3-4* materials on feedback. Emphasize the following points to guide feedback to the practice trainers.

Exercise 3-4 materials

- Focus on the behavior of the individual; describe the person's behavior; not the personality or character of the person.
- Make your comments specific (what, when, where, etc.)

Exercise 16-1 Practice Training Session Review Sheet

- Direct your comments at behavior that can be changed.

INTRODUCE the exercise

- **TELL** participants to turn to *Exercise 16-1: Practice Training Session Review Sheet.*

OV 16-3, 16-4

- **REVIEW** the instructions on the exercise sheet.
- **REVIEW** the feedback criteria sheets.

CONDUCT the exercise

- **CONTINUE** with teaching until each participant presents his or her practice training session.
- **ROTATE** the roles of volunteer training team members and observers.
- **DISTRIBUTE** extra Review Sheets as needed.

SUMMARIZE the exercise

- **CONGRATULATE** participants for a job well done.
- **ASK** participants what they learned from this exercise.
- **PROVIDE** your general feedback about the preparation for, and use of, just-in-time training.

Exercise 16-1: Competency-based, Just-in-Time Practice Training Session

Instructions

1. Each participant will present a 5-minute competency-based, just-in-time training to a group of 4 participants who will receive the training as "team members". The goal is to have the team members perform the skill / task that the trainer is teaching.

2. The remaining participants will be observers and use the following review sheet to provide feedback to the participant. Listed in the left-hand column are criteria for conducting effective competency-based, just-in-time training. In the right-hand column there is space to record feedback. (3 minutes)

3. After the 5-minute presentation, the participants will provide feedback by stating what he or she thought went well and what was missing. (5 minutes)

4. Observers will provide additional feedback to the participant regarding what went well and what was missing. (5 minutes)

5. The volunteer team members may add feedback that has not already been stated.

6. End each feedback session with appreciation for the presenter and the observers. (2 minutes)

Feedback Sheet

Trainer: _____   Topic: _____

Criteria	Feedback **What did you see and hear? Be specific**
1. Chose an appropriate topic for just-in-time training	Could the task be taught and participant performance evaluated in the available time?
2. Presents an effective introduction—previews the topic	What went well? What was missing?
3. States the objective(s) as part of the introduction	What went well? What was missing?
4. Presents all key information	What went well? What was missing?
5. Gives a demonstration or provides an example	What went well? What was missing?

Criteria	Feedback **What did you see and hear? Be specific**
6. Provides opportunity for practice	What went well? What was missing?
7. Provides positive feedback on the steps or tasks the team performed well	What went well? What was missing?
8. Uses questions to involve the team in discussion	What went well? What was missing?
9. Summarizes the learning	What went well? What was missing?
10. Evaluates participant performance	What went well? What was missing?

Criteria	Feedback **What did you see and hear? Be specific**
11. Guides team appropriately when they require help with the task	What went well? What was missing?

Closing - Day 4

Equipment, Materials, Supplies

❑ Newsprint, Easel, Markers, Masking tape

❑ End-of-course feedback forms of your choosing

❑ Course completion certificates, if desired

Preparation

❑ Review course goals and module objectives

❑ Develop and print end-of-course feedback forms of your choosing. A sample is provided.

❑ Develop, print and sign course completion certificates, if used.

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.

Time/Materials	Content/Activities
Review and Preview *5 minutes* *Posted expectations*	**REVIEW** the objectives associated with Day 4 training. **REFER** to the expectations list and the white index cards written at the beginning of the day to see if participants learned what they had hoped to learn and if there were remaining questions to be answered or addressed. **CROSS OUT** expectations that were met.
Feedback *10 minutes*	**ASK** participants for feedback on what they liked, and would do again, from today's training **ASK** participants for feedback on what they would change from today's training. **THANK** them, and **TELL** them what you will do with this information. (?changes for future classes)
Course Review and Summary	**REVIEW** the goals and major activities of the training session. **REVIEW** the expectations list to confirm all expectations were either met,

10 minutes

or identified as not being met during the course.

ASK participants if they feel they met the goals of the course. Have them give specific justification for their responses.

DISCUSS participant evaluation – that knowledge objectives were measured in end of day written evaluation, and skills-based objectives were measured in the workshops at the end of the course.

ASK participants if they feel they met all course objectives. Note those which they believe are not met, and provide advice on how they can be met by participants after training.

DISCUSS level 3 and 4 evaluation, if that can be part of post-course follow-up.

Feedback forms

DISTRIBUTE and collect end of course feedback forms.

5 minutes

Closing

If formal closing activities are necessary, complete them.

You may choose to distribute course completion certificates.

Sample End-of-Course Feedback Form

Course Title
Date

Your candid reaction to this training is important to us. Please answer the questions below and add any other comments that you may have. Thank you.

Job title or specialty _____

Please describe your previous exposure, if any, to quality assurance, working in teams, facilitation or training.

_____

On a scale from 1 to 5, with 1 being the lowest, please circle the number that best represents your agreement with these statements.

		Strongly Disagree				Strongly Agree
1.	My expectations of the training were met.	1	2	3	4	5
2.	This content has application to my work.	1	2	3	4	5
3.	The facilitator presented his or her message in an understandable way (fill in names).					
	_____	1	2	3	4	5
	_____	1	2	3	4	5
	_____	1	2	3	4	5
	_____	1	2	3	4	5
4.	The facilitator answered questions in a complete and satisfactory manner.					
	_____	1	2	3	4	5
	_____	1	2	3	4	5
	_____	1	2	3	4	5
	_____	1	2	3	4	5

Please rate the following items using this scale:

1 = poor; 2 = fair; 3 = good; 4 = very good; 5 = excellent

5.   Format (discussion, lecture, exercise)   1   2   3   4   5

6.   Visuals   1   2   3   4   5

7.   Participant materials   1   2   3   4   5

8.   Based on your previous knowledge and experience, the level of the course was:
☐ Too basic   ☐ Appropriate   ☐ Too complex

If not appropriate, please state reasons:

_____

9.   Which, if any, of the exercises, activities, or discussions helped you most to understand the content?

_____

10.   What was the most effective part(s) of the course?

_____

11.   What was the least effective part(s) of the course?

_____

12.   What are your suggestions for improving the materials or course?

_____

13.   Suggested topics you would like for future activities:

_____

14.   If someone were to ask you if they should attend this course in the future, what would your recommendation be?

_____

Did this training give you the information and skills necessary to enable you to:

15.   (insert course goal)   ☐ Yes   ☐ No

16.   (insert course goal)   ☐ Yes   ☐ No

17.   (insert course goal)   ☐ Yes   ☐ No

18.   Please write any additional comments or suggestions below.