Instructional Training for the Public Health Professional
Instructional Training for the Public Health Professional was developed as a guide for public health professionals tasked with training adult learners on various topics of public health. This manual and the associated slides are intended to be suggestions on how to be effective trainers and by no means encompasses all available knowledge on adult learning or instructional training.

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CSTE would like to thank the following individuals for their thoughtful contributions and collaboration:

Joseph Russell  Consultant; Kalispell, MT
Thuy Kim  Council of State and Territorial Epidemiologists; Atlanta, GA
India Bowman  Council of State and Territorial Epidemiologists; Atlanta, GA
Donald Sharp  Centers for Disease Control and Prevention; Atlanta, GA
Dale Morse  Centers for Disease Control and Prevention; Atlanta, GA
Elizabeth Landeen  National Environmental Health Association; Las Vegas, NV
Elaine Scallan  University of Colorado, Denver; Denver, CO
Christine Van Tubergen  University of Colorado, Denver; Denver, CO
Alice White  University of Colorado, Denver; Denver, CO
Atisha Morrison  University of Colorado, Denver; Denver, CO
Rachel Jervis  Colorado Department of Public Health & Environment; Denver, CO
Ingrid Hewitson  Colorado Department of Public Health & Environment; Denver, CO
Kerri Brown  Colorado Department of Public Health & Environment; Denver, CO
<table>
<thead>
<tr>
<th>Name</th>
<th>Affiliation</th>
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<tbody>
<tr>
<td>Allison Seidel</td>
<td>Colorado Department of Public Health &amp; Environment; Denver, CO</td>
</tr>
<tr>
<td>Sally Born</td>
<td>Colorado Department of Public Health &amp; Environment; Denver, CO</td>
</tr>
<tr>
<td>Chad Bailey</td>
<td>Florida Department of Health; Tallahassee, FL</td>
</tr>
<tr>
<td>Jamie DeMent</td>
<td>Florida Department of Health; Tallahassee, FL</td>
</tr>
<tr>
<td>Teresa Gorden</td>
<td>Florida Department of Health; Tallahassee, FL</td>
</tr>
<tr>
<td>Laura Castro</td>
<td>Florida Department of Health; Tallahassee, FL</td>
</tr>
<tr>
<td>Kelly Tomson</td>
<td>Florida Department of Health; Tallahassee, FL</td>
</tr>
<tr>
<td>Ynes Ortega</td>
<td>University of Georgia; Athens, GA</td>
</tr>
<tr>
<td>Elizabeth Beshearse</td>
<td>University of Florida; Gainesville, FL</td>
</tr>
<tr>
<td>Arie Havelaar</td>
<td>University of Florida; Gainesville, FL</td>
</tr>
<tr>
<td>Amy Woron</td>
<td>State of Hawaii Department of Health; Pearl City, HI</td>
</tr>
<tr>
<td>Craig Hedberg</td>
<td>University of Minnesota; Minneapolis, MN</td>
</tr>
<tr>
<td>Joshua Rounds</td>
<td>Minnesota Department of Health; Minneapolis, MN</td>
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<tr>
<td>Kirk Smith</td>
<td>Minnesota Department of Health; Minneapolis, MN</td>
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<tr>
<td>Richard Danila</td>
<td>Minnesota Department of Health; Minneapolis, MN</td>
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<tr>
<td>Carlota Medus</td>
<td>Minnesota Department of Health; Minneapolis, MN</td>
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<tr>
<td>Sean Buuck</td>
<td>Minnesota Department of Health; Minneapolis, MN</td>
</tr>
<tr>
<td>Brooke Wiedinmyer</td>
<td>Minnesota Department of Health; Minneapolis, MN</td>
</tr>
<tr>
<td>Victoria Lappi</td>
<td>Minnesota Department of Health; Minneapolis, MN</td>
</tr>
<tr>
<td>Renato Orsi</td>
<td>Cornell University; Ithaca, NY</td>
</tr>
<tr>
<td>Genevieve Sullivan</td>
<td>Cornell University; Ithaca, NY</td>
</tr>
<tr>
<td>Martin Wiedmann</td>
<td>Cornell University; Ithaca, NY</td>
</tr>
<tr>
<td>Alexandra Newman</td>
<td>New York State Department of Health; Albany, NY</td>
</tr>
<tr>
<td>Paula Pennell-Huth</td>
<td>New York State Department of Health; Albany, NY</td>
</tr>
<tr>
<td>Madhu Anand</td>
<td>New York State Department of Health; Albany, NY</td>
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<tr>
<td>Lisa Mingle</td>
<td>New York State Department of Health; Albany, NY</td>
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<tr>
<td>David Nicholas</td>
<td>New York State Department of Health; Albany, NY</td>
</tr>
<tr>
<td>Danielle Wroblewski</td>
<td>New York State Department of Health; Albany, NY</td>
</tr>
<tr>
<td>Hillary Booth</td>
<td>Oregon Health Authority; Portland, OR</td>
</tr>
<tr>
<td>Name</td>
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<tr>
<td>Paul Cieslak</td>
<td>Oregon Health Authority; Portland, OR</td>
</tr>
<tr>
<td>June Bancroft</td>
<td>Oregon Health Authority; Portland, OR</td>
</tr>
<tr>
<td>Jeff Bethel</td>
<td>Oregon State University; Corvallis, OR</td>
</tr>
<tr>
<td>Kevin Jian</td>
<td>Oregon State University; Corvallis, OR</td>
</tr>
<tr>
<td>Sarah Humphrey</td>
<td>Oregon Health Authority; Portland, OR</td>
</tr>
<tr>
<td>Eric Mone</td>
<td>Oregon Health Authority; Portland, OR</td>
</tr>
<tr>
<td>Sharon Thompson</td>
<td>University of Tennessee, Knoxville; Knoxville, TN</td>
</tr>
<tr>
<td>John Dunn</td>
<td>Tennessee Department of Health; Nashville, TN</td>
</tr>
<tr>
<td>Katie Garman</td>
<td>Tennessee Department of Health; Nashville, TN</td>
</tr>
<tr>
<td>Tamara Chavez-Lindell</td>
<td>Tennessee Department of Health; Nashville, TN</td>
</tr>
<tr>
<td>Steffany Cavallo</td>
<td>Tennessee Department of Health; Nashville, TN</td>
</tr>
<tr>
<td>Linda Thomas</td>
<td>Tennessee Department of Health; Nashville, TN</td>
</tr>
<tr>
<td>Jeannette Dill</td>
<td>Tennessee Department of Health; Nashville, TN</td>
</tr>
<tr>
<td>DJ Irving</td>
<td>Tennessee Department of Health; Nashville, TN</td>
</tr>
<tr>
<td>Danny Ripley</td>
<td>Metro Public Health Department; Nashville, TN</td>
</tr>
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Instructional Training for the Public Health Professional

Administrative Module

This module is designed to provide the participant-instructor with the necessary background and resources to administer the course. The module will guide the instructor from the pre-event planning phase up to the first instructional module.

References for the Entire Course:


Module Objectives

By the end of this module, the instructor will be able to conduct the necessary tasks to set up and administer this instructional training course.

- Create a positive learning environment
- Provide a conceptual framework of the course for participants
- Accomplish the task list required prior to any course delivery

Instructional Note

Explain to the participants that the module objectives slide contains the performance objective (the sentence beginning with “By the end) and the enabling or supporting objectives in bulleted format.

Performance Objective

By the end of this module, the instructor will be able to conduct the tasks needed to set up and administer this instructional training course.
Enabling Learning Objective
By the end of this module, the instructor shall accomplish the following learning objectives in support of the performance objective:

- Create a positive learning environment
- Provide a conceptual framework of the course for participants
- Accomplish the task list required prior to any course delivery

Pre-course Planning

Proper Prior Planning Prevents Poor Performance

Instructional Note
Don’t spend any time with this slide other than to ask if the participant have ever heard the saying before and this concept is very important to a successful delivery. Move directly to the next slide.

“Proper Prior Planning Prevents Poor Performance”
Successful instruction requires planning well in advance of the course delivery. Every instructional team must designate a lead instructor. This person will be in charge of all course logistics. The leader will not conduct every activity, however they will be responsible for delegating tasks to the training team and will serve as the main point of contact (POC) for the delivery site.

**Pre-Course Planning**

Four weeks in advance of the course delivery, the lead instructor must make contact with the point of contact (POC) at the delivery site. The POC will be the contact for the lead instructor on all logistical matters relating to the delivery. During the initial meeting, the lead instructor will provide information on the course, the desired number of participants and the disciplines that should be represented at the course delivery. A flyer describing the course should be available in electronic form. A roster sheet is to be maintained for credentialing purposes. The POC may have a preferred roster sheet, but if not, the lead instructor will provide one electronically. The lead will consult with the POC on desired room set up and audio-visual requirements for the delivery.

Three weeks in advance of the course delivery, the lead instructor will contact the POC for updates on course participant numbers and decide if the course will be delivered. If materials are to be mailed, the shipping address will need to be obtained from the POC at this time. The lead instructor will also provide a letter regarding the course to the POC for distribution to participants. This introductory letter will provide the date(s) of the course, the location and any special instructions regarding the site, the names of the POC as well as the Instructors. A short narrative regarding the course content should also be provided. A sample letter is provided in the Appendix. At this point, the lead shall make course assignments to the instructors. A sample of a course assignment is provided in the appendix.

Course material is to be mailed at least one week prior to the delivery. The POC will verify all materials have arrived against a check list provided by the lead instructor.
**Resources Required for this Module:**

- Instructor Guide for Instructors and Participants
- Laptop Computer with Presentation Slides Uploaded
- External Speakers
- External Storage Device (Jump Drive) with Presentation Slides
- Computer Projection Equipment with all Possible Connection Cabling
- Projection Screen
- Markers of Various Colors
- Easel Pad
- Sign-in Sheets
- Table Name Tents
- Pencil and Highlighter

**Initial On-site Activity**

It is ideal to set up for the course the day prior to the start of the delivery. Module 6 discusses the various ways to arrange seating and tables. Arrangement of the table and seating should match the learning setting. If possible, stay away from theater and traditional classroom settings. These settings are generally not considered optimal for adult learners in a training setting where team building will be encouraged. All participant materials shall be set at each table appropriate to the seating at the table or pod. A table with the sign-in sheet shall be placed near the main entrance to the room. This is the appropriate time to set up the laptop and make sure it is functioning properly. Do not wait until a few minutes before the course to conduct your equipment check!

All material should be placed at each participant seat and the computer should be on and functional 30 minutes prior to instruction. As participants enter, they should be welcomed by an instructor and
directed to the table with the sign-in sheet(s). After they sign in they are directed to find a seat and any special instructions can be provided by the instructor. Instructors may request participants to sit by organization or by discipline. It is easier to seat participants in a desired configuration than to have to move them later. Instructors should walk around the room and make sure table tent name cards are filled in with names and any other information required. It is also a good opportunity to make informal introductions and some initial assessments of the participants.

Start of the Course

Welcome

- Point of contact and invited guests
- Room/facility logistics
- Breaks and lunch
- Distractive activity

The lead instructor shall welcome the participants to the course and introduce the POC and any other non-participants. The lead will review site logistics such as exits, toilet rooms and break areas and vending machines. The lead will provide information regarding breaks and lunch. Lastly, the lead will ask participants to silence their cell phones and take calls in a designated area as so not to disrupt the class delivery or other activities at the delivery site.
Introductions

Activity
Take a few minutes to fill out the information requested. Space is provide in the manual.

Introductions

- Name
- Title/Discipline (years of service)
- Organization
- What did you do prior to this profession?

Instructional Note

The instructional team will make their introductions starting with the lead. Introduction should follow the slide and include years of experience.

Give participants a minute to fill in the requested material on the slide provided in the space below. When the participants have completed the task, the lead instructor shall prompt participants to stand and provide their responses. The icebreaker question may make some participants uneasy. Encourage a response but don't press participants if it is clear they do not want to answer.

The adult learner wants to develop a sense of community within the learning setting. Instructors lead by example by actively participating during the introductory session. Instructors must be standing and listening actively. Instructors that appear not to be engaged during introductions establish the wrong impression about introductions and the importance of community.
The goal of this course is to provide you with the tools that are necessary to make you a better instructor. Throughout the remainder of this course you will understand what is meant by tools but for now, tools will suffice. Most participants in this instructional setting will have been instructors at some point. Whether a novice or the seasoned instructor, this course is intended to identify and strengthen the tools to becoming a more effective instructor.
Course Agenda

Module 1: Administrative. This module provides instructors with the background and material to administer the course. The module will guide the instructor from the pre-event planning phase up to the first instructional module.

Module 2: The Adult Learner. This module discusses adult learning theory and the characteristics of the adult learner.

Module 3: Instructional Design and Strategies. This module defines instruction and explores methods and tactics to motivate and provide instruction to the adult learner.

Module 4: Instructor Competencies. This module provides context to instructor competencies as a set of performance standards for the instructor. The module also discusses instructor assessment and course evaluation as an important component in the competency process.

Module 5: Instruction and Delivery Skills. This module explores the characteristics of the credible instructor. The module explores some of the more common tools used with instruction.

Module 6: Challenges to Effective Instruction. This module identifies physical and social-emotional challenges to effective instruction and identifies ways to overcome these challenges.
By the end of this module, the participant instructor will be able to conduct the necessary tasks to set up and administer this instructional training course. To support this performance objective, the following enabling learning objectives were created:

- Accomplish the task list required prior to any course delivery
- Create a positive learning environment
- Provide a conceptual framework of the course for participants
Coming Up Next

The Adult Learner
This module provides instructor participants a definition of learning, a definition that lays the framework for much of the material in this manual. The module identifies characteristics of the adult learner and builds upon these characteristics to better understand adult learning theory.
Module Objectives

By the end of this module, participants will understand the meaning of learning and apply the characteristics of the adult learner to adult learning theory.

- Explain the definition of learning
- Recognize the differences between the adult learner and the child learner
- Identify the various processes and approaches used by the adult learner

Performance Objective

By the end of this module, participants will be able to explain the meaning of learning and apply the characteristics of the adult learner to adult learning theory.

Enabling Learning Objectives

By the end of this module, the instructor shall accomplish the following learning objectives in support of the performance objective:

- Explain the definition of learning
- Recognize the differences between the adult learner and the child learner
- Identify the various processes and approaches used by the adult learner
In its simplest meaning, learning can be defined as the acquisition of knowledge. But this meaning falls well short of understanding the adult learner. Learning is defined by Klein (2004) as “a stable and persisting change in knowledge, skills and attitude”. Let’s break this down to the component parts:

### Breaking Down the Definition

#### Stable
- A steady and constant process where learners build on prior learning and create a scaffold that supports future learning

#### Persisting
- a change that is not temporary  
- an evolving process

#### Change
- the act making or becoming different

Stable. In the context of learning, stable is applied to be steady and constant. It is an active process where learners build on prior knowledge and create a scaffold that supports future learning.
Persisting. For learning to be of value, it must persist over time. There must be a change that is not temporary – going back to the place you were. It must be noted that the term permanent was not used to describe the change. Change may continue to evolve.

Change. Change is the act making or becoming different.

Knowledge, Skills and Attitude. Through the work of Dr. Benjamin Bloom and a committee (1956), three domains or categories of educational activity (learning) were identified. The three domains include cognitive learning (mental skills or knowledge), psychomotor learning (manual or physical skills - skills) and affective learning (growth in feelings or emotional areas – attitude).

The Knowledge Domain

Knowledge describes the cognitive domain associated with the development of intellectual skills. There are six major levels or categories in the cognitive domain. The six domains depicted in Figure 1 below are considered Bloom’s Revised Taxonomy and is the work of Anderson and Krathwohl in 2000.

Remembering, what is often called the first rung of Bloom’s ladder to mastery learning, demonstrates the skill of recall – the facts. The second rung of the ladder is the skill of understanding – rephrasing and summarizing. The mid level of the taxonomy is the skills of applying and analyzing. The third rung in the ladder demonstrates the skill of applying – use the concept in a new situation. The forth skill is analyzing – break down the concept to its component parts for higher comprehension. The highest two levels in Bloom’s taxonomy is evaluating and creating. The evaluating skill demonstrates the ability to make judgements about the concept – compare and critique may be operable concepts associated with this skill. The highest level in the taxonomy is the skill of creating – depicted by using the concept to create a new model.
The Skills Domain

The second stable and persisting change we seek is to the concept of skill, oftentimes referred to as the psychomotor domain. This domain is associated with psychomotor learning and includes physical movement, coordination and motor-skill development. The psychomotor domain has at least three predominate models that have been developed. A simplified and combined taxonomy of Harrow (1972), Dave (1970) and Simpson ((1972) is provided below.

- Observing, the lowest rung on the ladder, is the act of the watching the more experienced person perform a task.
- Imitating is the first step in learning a skill. The learner is observed and provided feedback on their performance. At this stage the movement is not automatic or smooth.
- Practicing is the act of trying a task over and over. The skill is repeated and a sequence of skills is performed repeatedly. Movements appear more automatic and smooth but an entire routine is not fluid.
- Adapting is the stage when minor adjustments are made in the activity to move towards perfection. At this stage, a coach may be necessary to provide improvement in the skill.
The Attitude Domain

The attitude domain, often referred to as the affective domain includes the manner in which we deal with things emotionally. Concepts such as value, enthusiasm and motivation are found in this domain. Following Bloom’s Taxonomy, the affective domain was developed by Krathwohl, Bloom and Masia (1973) and as is depicted in Figure 2 below.

Instructional Note
An example explaining this domain is dancing. In becoming and expert at dance, one first observe others, they may then take lessons or read to learn some of the actions, they would then practice a skill and then combine the skill into a series of actions to achieve harmony and consistency of action. The last step is the perform until it become second nature or natural. Only an expert will make changes to skills at this point.
The first level in the domain is receiving phenomena. It is the concept of awareness and willingness to hear. The second level is responding to phenomena and is demonstrated by active participation. A class discussion or questioning new ideas would be examples in this level. The third level in the taxonomy is valuing. Valuing is demonstrated by the expression of behaviors associated with a certain phenomenon or behavior. Organization is the fourth level in the affective domain. Organizing one’s values into a set of priorities. An example of this would be the establishment of a work-life balance. The final level is internalizing values. This step is characterized by creating a value system that controls behavior. This is the most important characteristic of the learner. Mastery at this level allows the learner to work productively in group and adjust judgement based on new information.

Adult Learning Theory
The adult learning theory comes from the work Malcom Knowles and many others on the theory of adult learning, or andragogy. This contrasts to pedagogy, the term describing the child learner. Andragogy, adult learning theory, can be considered more of a process model whereas pedagogy is more of a content model. There are six assumptions associated with the model:

- Self-concept.
- Experience.
- Readiness to Learn.
- Orientation to Learn.
- Motivation to Learn.
- Need to Know.
Adult Learning Model

- **Self-Concept**: Adult learners are generally more self-directed as they believe they are responsible for the outcome of their lives.
- **Level of Experience**: Adult learners use prior life experiences as a basis for learning and use prior experiences to learn new concepts.
- **Readiness to Learn**: Adult learners are more driven to learn if the information being conveyed has value to them. Subject matter must have relevance.
- **Learning Orientation**: Adult learners are more driven to learn if the information being conveyed has value to them.
- **Motivation to Learn**: Adult learners’ motivation to learn is internal, referred to as intrinsic motivation. They want to learn for personal satisfaction, enjoyment or interest in the subject matter.
- **Need to Know**: Adult learners may need to know why certain subject matter has relevance to them without any preconceived reason to learn.

Instructional Note

The instructor will use this slide to highlight adult learning characteristics from the six assumptions of the model. Mention to the participants that each assumption is explored in much more detail in the manual. From the top box, moving to the right:

- Self-concept. Adult learners are generally more self-directed as they believe they are responsible for the outcome of their lives.
- Level of experience. Adult learners use prior life experiences as a basis for learning and use prior experiences to learn new concepts.
- Readiness to learn. Adult learners are more driven to learn if the information being conveyed has value to them. Subject matter must have relevance.
- Learning orientation. Adult learners are more driven to learn if the information being conveyed has value to them.
- Motivation to learn. Adult learners’ motivation to learn is internal, referred to as intrinsic motivation. They want to learn for personal satisfaction, enjoyment or interest in the subject matter.
- Need to know. Adult learners may need to know why certain subject matter has relevance to them without any preconceived reason to learn.
Self-Concept
Children are dependent learners. As a dependent learner, they rely on others to provide them the information they learn. During the earliest stages of development, the dependent learner takes the information in a “one-way” format. A dependent learner would prefer a lecture environment with structure with externally-defined goals and reinforcement. As a person matures, they move from this dependent model to one being more self-directed.

Adult learners are generally more self-directed in their learning approach. Adult learners believe they are responsible for their lives. The adult learner wants to be in control over their learning. They have self-defined goals and may require reassurance from others that they are achieving their goals.

The self-directed adult learner:

- Takes initiative in learning
- Self-directed learning assumes that the natural orientation of adult learners is task or problem-centered.
- Expect the physical environment to be comfortable and adult-oriented
- Expect a psychological climate of mutual respect and trust in an atmosphere of collaboration.

Level of Experience
The child learner is generally considered to lack experience and there is no reliance on the reinforcement of learning with “real life” examples. Since there is an assumption that the child learner is devoid of experience, they are told what they need to know. To the child learner, experience is something that happens to them.

The adult learner uses prior experience as a basis for learning and are capable of using prior experience to learn new concepts. Instruction to the adult learner should include discussion, and problem-solving activities. To the adult learner, experience is who they are.

The experienced adult learner:

- Their maturity in the learning phases is in-tune with the natural process of psychological development. That is, the learners’ experiences become an increasingly rich resource along a maturity continuum.
- May give meaning and authenticity to subject matter.
- May create an active learning process whereas the inexperienced learner will be passive as they have no experiences to draw from to inform learning.

Readiness to Learn
The child learner is driven extrinsically to learn. They learn more to satisfy a rigid system, such as completing a curriculum and getting a grade, possibly to please someone else such as a teacher or parent. It is more about transferring a foundational knowledge and evaluation of what is learned.

The adult learner is more driven to learn if the information being conveyed has value to them. The adult learner does not want to spend time in a learning environment that is irrelevant to their own needs and desires. The adult learners’ readiness to learn may be characterized by the following:
• The social role of the adult can be a major reason adults engage in learning. Examples of this may be a mother-to-be may be motivated to learn parenting skills whereas there may have been little desire to learn parenting skills prior to pregnancy.
• Curiosity or the enjoyment in learning new things
• Desire to overcome a problem
• Looking for connections between well-understood concepts and newly-recognized learning opportunities.
• Educators of adults must create a readiness to learn with techniques that are experiential in nature.

Learning Orientation
An instructor-centered approach is generally the approach used with the child learner. There is very little input by the child learner and it is more about “pushing in” content to the learner with very little regard to drawing out from the learner.

The adult learner prefers instructional approaches that are learner-centered with a focus on problem solving. Learning methods are best when they incorporate exercises and role-playing. They prefer real-life situations and tend not to want deep discussions related to theory. Adult learners prefer flexibility and to be in control when approaching objectives set out for learning.

The learning preferences of the adult learner are characterized by the following:
• Drastic move from subject-centered learning to problem-centered learning
• Learning experience is enhanced with real-life situations.
• Desire immediate application of knowledge learned

Motivation to Learn
The child learner is generally extrinsically motivated to learn. That is, they are motivated to perform in order to earn a reward or to avoid punishment.

As a person matures in relation to the learning process, motivation to learn is internal, referred to as intrinsic motivation. Intrinsic motivation is occurring when a person wants to do something such as for personal satisfaction, enjoyment or interest in the subject matter.

The adult learners’ motivation:
• Is internally motivated to learn.
• Learning leads to personal growth and fulfillment. “Fully-Functioning Adult”

Need to Know
The child learner is not so concerned with the relevance of the subject matter to their daily lives but have a sense of wonder and exploration. The child learner is often powerless to change the subject matter and do not make any demands to know why they are learning the subject matter.

The adult learner may learn a subject matter due to its relevance to an immediate situation. More importantly, the adult may need to know why certain subject matter has relevance to them without any preconceived reason to learn. There are situations where learning is mandated or where the learning is
in preparation for some future application. This is an important concept with the adult learner and may pose a considerable challenge to the adult educator. From an instructional perspective, the question of “What’s in it for Me” should be considered when preparing for the adult learner.

The adult learner and their need to know:

- Necessitated by a reason for learning
- In the absence of an immediate need to know, the question “what’s in it for me” must be answered.

### Activity

**Readiness to Learn**

Describe a time where learning was desired:

- To fulfill a social role
- For curiosity or enjoyment
- To overcome a problem

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**Instructional Note**

This activity will reinforce the “Readiness to Learn” assumption of the adult learner. Ask participants to review the section on “Readiness to Learn” above and fill in their responses in the spaces provided below. Participant time to fill in responses should take no more than five minutes. Call on willing participants for responses.
This activity will reinforce an important assumption of the adult learner – Readiness to Learn. Please review the section on readiness to learn above and fill in your responses in the space provided below.

**I exhibited a readiness to learn to fulfill the following social role:**
_____________________________________________________________________________________
_____________________________________________________________________________________

**I exhibited a readiness to learn for curiosity or enjoyment:**
_____________________________________________________________________________________
_____________________________________________________________________________________

**I exhibited a readiness to learn to overcome a problem:**
_____________________________________________________________________________________
_____________________________________________________________________________________

Comparison of Adult and Child Learning:

The table below contrasts the adult and child learner using the six assumptions of Knowles and others.

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<tr>
<td>Self-Concept</td>
<td>Dependent</td>
<td>Self-Directing</td>
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<td>Level of Experience</td>
<td>Inexperienced</td>
<td>Experienced</td>
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<td>Readiness to Learn</td>
<td>Related to human</td>
<td>Related to changing</td>
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<td>roles</td>
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<td>Life/Problem/Task</td>
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<td>Motivation to Learn</td>
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<tr>
<td>Need to Know</td>
<td>Exploration</td>
<td>Relevance</td>
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Learning Processes and Approaches

There is a vast multitude of research that can be accessed describing learning preference or learning style. A learning style is not to a personality trait. A learning style that is generally developed through an experiential process. Learning style has various elements that will help to understand its importance to instruction. One element of learning style to be considered is how information is process. How does the learner perceive, organize and store information? This may be referred to as sensory learning process. Another element to be considered is preference for instruction. Does the individual have a certain preference for learning in a certain way? This can be considered the learning approach.

Sensory Learning Processes

The sensory learning process is usually broken down into the sensory processes of visual, audio and kinesthetic or VAK. Most learners will have a predominate sensory learning process, but most learners will mix and match, oftentimes based on the instruction received. The importance of understanding these processes to the instructor rests with the understanding that how people learn is generally how they will instruct. Creating balance in delivery only occurs when instructors understand the characteristics of each of the sensory learning processes.

The following slides will highlight each sensory learning process. Refer participants to the table in the manual for a more detailed approach to each process.
The Visual Learning Process

**Visual Learning Process**

- Prefer directions to be written
- Participants with the greatest facial expressions and pick up on facial expressions of others
- Prefer visual aids such as charts and illustrations during instruction
- Provide highlighters and allow space for notetaking on materials provided

The Audio Learning Process

**Audio Learning Process**

- Participants are good at remembering what they hear
- Participant may not read body language well
- Use questioning to draw out oral responses
- Prefer to have instructions read aloud
- Instructors should be aware of voice inflection and modify volume as a means of emphasis
The Kinesthetic Learning Process

| Kinesthetic Learning Process |
|-----------------------------|---------------------------------------------------------------|
| • Prefers hands-on activities to reinforce what is written or said |
| • May undertake tasks without reading or hearing directions |
| • Participants need frequent breaks and do not discourage standing during instructional periods |
| • Write out information during lecture |
| • Provide hands-on exercises to reinforce learning objectives |

The following table will break down each of the three processes:

<table>
<thead>
<tr>
<th>Sensory Learning Process</th>
<th>Visual</th>
<th>Audio</th>
<th>Kinesthetic</th>
</tr>
</thead>
</table>
| Characteristics of Learners | *Prefer directions to be written.  
*May draw or doodle during lecture.  
*Tend to be the participants with the greatest facial expressions and pick up on facial expressions of others. |
| *Good at remembering what they hear.  
*May not be great note-takers.  
*Will retain information better if there is discussion.  
*May avoid reading aloud.  
*May seem stoic in the instruction environment and may not read body language well. |
| *Prefers hands-on activities to reinforce what is written or said.  
*May undertake tasks without reading or hearing directions.  
*May have difficulties remaining seated during lecture.  
*May be perceived as active or athletic. |

<table>
<thead>
<tr>
<th>Strategies for Learners</th>
<th>* Use visual aids such as charts and illustrations during instruction</th>
</tr>
</thead>
</table>
| * Review aloud. intention of instruction  
* Use questioning to draw out oral responses. |
| * Instructors must move while they lecture or read.  
* Use exercises that use hands-on activities. |
| Strategies for Instruction                              | * Provide clear, concise written instruction  | * Read instructions aloud.  
* Use recorded audio when possible.  
* Be aware of voice inflection and modify volume as a means of emphasis. | * Use demonstrations during instruction.  
* Provide hands-on exercises to reinforce learning objectives.  
* Encourage active participation. |
|--------------------------------------------------------|------------------------------------------------|------------------------------------------------------------------|---------------------------------|
|                                                         | * Slides and other illustrative material must be visually appealing using color as appropriate.  
* If possible, provide highlighters and allow space for notetaking on materials provided. |                                                                  |                                 |
| Instructors may need to get the attention of the learner.  
* List key points of instruction on easel pads, white boards, projected computer screens. | * Explain charts, graphs and illustrations aloud.  
* Paraphrase.                       |                                                                  |                                 |
| Explain charts, graphs and illustrations aloud.  
* Paraphrase.                       | * Read aloud.  
* Take frequent breaks and do not discourage standing during instructional periods.  
* Write out information during lecture. |                                                                  |                                 |
| Learners will generally lean towards one of the sensory learning processes, but learners are able to utilize all three in the learning process. Instruction should incorporate all three processes and it may be more important to match the process to the most appropriate means of delivering the subject matter. The activity which follows will introduce the participants to the VAK model. The survey utilized in the activity is one of several surveys available. Two other on-line surveys are provided here: |                                                                  |                                 |
https://www.webtools.ncsu.edu/learningstyles/ |                                                                  |                                 |
Activity

Take 10 to 15 minutes to fill out the survey. A brief discussion will follow the exercise.

VAK Survey

This survey is intended to identify your preferred method of learning. Fill out the provided survey and fill in the total of each section in your instructor manual.

Instructional Note

Instruct participants to fill out the survey and total each page. The total of each page is then copied into the manual in the table provided. Once all participants have completed the table in the manual, ask their general impression of the survey and if the style or process fits what they believed was their style prior to the survey. Some participants may be balanced in their scoring and others, not. The main purpose of this exercise is two-fold. It first tells you that all learning style will be represented in a classroom, and learning styles and instructor styles will be similar. That is, if you tend to be an audio style learner, you may prefer instruction techniques that fit that those processes. You may enjoy questioning and audio presentations as an instructor. Remind participants that we instruct to the entire class and a balanced approach to sensory process is best.
Total each section and place the sum in the blocks below:

<table>
<thead>
<tr>
<th>VISUAL</th>
<th>AUDITORY</th>
<th>KINESTHETIC</th>
</tr>
</thead>
<tbody>
<tr>
<td>number of points:</td>
<td>number of points:</td>
<td>number of points:</td>
</tr>
</tbody>
</table>

While you prefer to learn by using the method with the highest score, you will normally learn best by using all three processes, rather than just your preferred learning style.

Learning Approaches

Learning approaches move past sensory processes and focuses on how information is assimilated into knowledge, skills and attitude. It can be equated to the higher rungs of Bloom’s hierarchy past just remembering and understanding. There are numerous preferences and styles that can be mentioned here but this document will focus on a few approaches most important in face-to-face settings.

The problem-solving learning approach incorporates activities that requires learners to solve problems that reinforce learning objectives. A problem-centered approach, whether real-life and simulated will reinforce learning objectives. From and instructional perspective, problem solving may be conducted by an individual or in group settings and is more dependent on the subject matter that individual characteristics.
The competitive learning approach where individuals or teams compete with each other to introduce or reinforce a learning objective. The competitive approach generally can be equated to playing games. For example, a Jeopardy-style game can be used effectively in adult group learning settings. In a very simplistic approach, questioning may be considered a competitive learning approach with some learners.

A collaborative learning approach utilizes activities in which individuals or teams collaborate to achieve an objective. This is contrasted to a competitive learning approach whereas learners are encouraged to bring their various knowledge, skills and attitudes to the process to enhance outcomes.

Another important aspect of a learning approach in which individuals work apart from others in the learning setting is the reflective learning approach. This inward reflection on past experiences may reinforce learning objectives. This individual time may provide learners important time to formulate thoughts and, in turn, enhance group learning activities.

Summary

By the end of this module, participants will understand the meaning of learning and apply the characteristics of the adult learner to adult learning theory. To support this performance objective, the following enabling learning objectives were created:

- Understand the definition of learning
- Recognize the differences between the adult learner and the child learner
- Identify the various processes and approaches used by the adult learner
Coming Up Next

Instructional Design and Strategies
Instructional Training for the Public Health Professional

Instructional Design and Strategies

Module 3

This module provides participants with a definition of instruction, a definition that lays a framework for the strategies and tactics used with instruction.
Module Objectives

By the end of this module, participants will be able to understand and apply instructional strategies to enhance the adult learning experience.

- Explain the motivation factors of the adult learner
- Identify tactics or strategies utilized in the adult learning process
- Explain how to set meaningful learning objectives
- Recognize and monitor learner engagement
- Describe the elements that contribute to a safe learning environment

Performance Objective

By the end of this module, participants will be able to understand and apply instructional strategies to enhance the adult learning experience.

Learning Objectives

By the end of this module, the instructor shall accomplish the following learning objectives in support of the performance objective:

- Explain the motivation factors of the adult learner.
- Identify tactics or strategies utilized in the adult learning process
- Explain how to set meaningful learning objectives
- Understand and monitor learner engagement
- Describe the elements that contribute to a safe learning environment
Definition of Instruction

Instruction

“Fostering the learning process.”

—Fifth Discipline 1994

Instructional Note

The Instruction slide will appear with only the title. Ask participants to tell you how they would define instruction. Then click the slide to reveal Peter Senge definition as it appeared in the 1994 book “The Fifth Discipline”. 
Motivation

Motivating Factors of the Adult Learner

- Why the subject matter is important to them
- They come to a learning setting with expectations about the outcome
- They are constantly evaluating the instructor based upon their values
- They want to be engaged
- They bring their experiences to the learning setting

Responsibility to learn is the learners and instruction motivates the learning process. Instruction of the adult learner is complex and challenging. The child learner generally wants to absorb everything they are taught. They have no preconception of material to be learned. The child learner does not have to be told the importance of the subject matter. They assume it is based on the fact that is being taught to them. This is in sharp contrast to most adult learners. The adult learners' reason and purpose for learning creates their motivation, therefore it is necessary to understand the reasons and purpose and apply these in instructional design and strategy.
Some of the more notable motivating factors of the adult learner are as follows:

- They always want to know why the subject matter is important to them in its applicability to their various life settings.
- They often come to a learning setting with expectations about the outcome.
- They are constantly evaluating the instructor based upon their values.
- They want to be engaged.
- They bring their experiences to the learning setting.

The adult learner is busy, at least they perceive their lives to be busy. When learning opportunities arise, they begin the deliberative process of acceptance that this is an important learning opportunity and it is worth the time to participate. In a perfect world, individuals would pass up learning opportunities when they felt it was not in their best interest. But we know this does not occur. On many occasions people are compelled to a learning setting by external forces out of their control. These “prisoners” have not gone through their own process and feel trapped in the setting. Others, those that just want to get away from work, also have not gone through a process of acceptance that the learning opportunity is worthwhile. These “escapees” can pose a significant problem as it relates to engagement in the learning setting. The instructor must be aware that not all participants have fully bought in to being present in the learning setting and has only a short time at the beginning to make their pitch. Participants oftentimes never get over their first impression of an instructor.

Instructors are constantly being evaluated by the adult learner – either consciously or subconsciously. The instructor must have a deep sense of self-awareness about their presence in front of learners. The
instructor must also demonstrate their subject-matter expertise in the formulation of their credibility with the adult learner. This part of credibility is demonstrated by what has been accomplished by the instructor but much more credibility is gained when the instructor actually gets in front of the learner. This topic is covered in-depth in Module 4.

The following must be considered with motivating the Adult Learner:

Will instruction be active? Active learning will include discussion, feedback and activities to stimulate the adult learner. Passive listening and reading should be reduced to a minimum and allow participant to discuss the course content with the instructor and with each other.

Adult learner comes to instruction with a desire to have their problem solved. Instruction should be problem-centric, not perceived as a one-way “content dump” as this is instructor-centric.

Link providing new information to previous experiences for greater retention. Establish time during instruction for participants to discuss with each other how the new information connects with what they already know. There connections may not be easily recognized by participants and the instructor may need to draw out these connections.

If instruction does not have relevance to the participant’s life and work, there will be little engagement. Content must have meaning and immediate relevance. If content is extremely complicated or presented in a way that there is a perception of the content being overly complicated, participants will disengage.

Instruction that makes an emotional connection with participants will enhance learning. In an attempt to make an emotional connection, be cautious not create fear. Fear is not a good motivating factor as it causes a physiologic response of “fight or flight” causing the brain to shut down from the ability to learn.
Instructors should program time for debriefing after emotional stories to allow participants time to reflect on their feelings and how it relates to the instructional material.

The adult learner brings some preconceived beliefs on how they learn and what they want to learn to the instructional setting. This self-directed learning concept can interfere or enhance in-person learning depending on the learner’s beliefs. The learner makes decisions about content, methods, resources, and evaluation of the learning. Since instruction is not, and should not be, able to address all adult learning style, an explanation of the material’s benefit to the learner and how the learning process is to occur will enhance the learning process.

The adult learner has an expectation that the content of instruction, learning outcomes and learning activities will be aligned. If alignment of content, outcomes and activities does not occur, the learner feels disconnected and the process of learning is hampered.

Last and certainly not least, learning must be fun. Fun starts with the instructor. If the instructor appears not to be having fun and enjoying instruction, it will not be lost on the participants.

**Instructional Tactics**

This section will present some tactics, methods, that can be utilized with the adult learner to sustain motivation and make the outcomes of the learning process positive to the learner and instructor.

As mentioned in the previous module, instructors instruct in a similar fashion as they learn. The VAK model was discussed in Module 2. That is, the visual learner as an instructor may tend to use visual props such as pictures and diagrams, whereas the auditory learner as an instructor may tend to the use of group discussion over reading. Since the instructor has no control over the type of learner, they must overcome their own preference and use all three modes for effective learning. The competent instructor must also recognize the diversity of learners in an instructional setting tailor the instruction as to not create biases.
The Systematic Instruction will incorporate the following strategies:

- Collaborate with learners in the planning of instruction,
- Make assessments of learners need and styles,
- Set clear and meaningful objectives and plan to meet them, and
- Evaluate your plan and adjust as necessary.

Collaboration with Learners

As expected in a learner-centered environment, the adult learner anticipates a well-planned learning session with learning objectives that meet their reasons for participating in the learning process. If the learning setting allows, instructors should collaborate with learners as they plan for instruction. When learners are provided the opportunity to take responsibility for the learning process they tend to learn more effectively. The instructor must acknowledge this and pull participants into the planning process to the greatest extent possible. If logistics allow, the instructor may meet with a small group of participants and facilitate a process where the intended audience creates the learning objectives. When it is not possible to meet with a group, the instructor may have an opportunity to meet with a manager and discuss possible learning objectives. The adept instructor understands to potential biases associated with this type of meeting and tailors questioning to move from a critique of their charges to organizational aspirations and how the intended instruction may assist in meeting organizational goals.

Planning in advance of learning is optimal. It may not be possible where impediments exist between instructors and participants prior to the learning event or may be impractical when a rigorous curriculum is delivered with little opportunity for modification. Instructors must not miss opportunities to draw the learner into planning instruction. There may be opportunities to meet telephonically but meeting richness is lost and not easily overcome. Spot interviews with the learners as they arrive may
be effective in some learning settings. In these circumstance it is imperative that the instructor anticipate potential responses and be ready to incorporate responses as objectives and instructional points. Whether or not planning occurred prior to learning, the instructor should ask for in-class feedback. Questions to consider when requesting feedback may be: “how are we feeling about the session?”, “when thinking back to the learning objectives, have we met your expectations of this learning session?” or “would you be able to take what was learned and apply it to a real-life setting?”. When considering the questioning of the participants, don’t wait until the absolute end of a session when there is no time to enter into clarifying discussions. This tends to create frustration in the adult learner!

Assess Participant Learning Needs and Styles
The adult learner expects a comfortable setting in which to learn. Comfort is a state of being which takes into consideration the physical aspects of the learning setting as well as the learning style of the participants. From a physical perspective, have you considered the following:

- What is the optimal temperature for learning?
- Is the setting properly lighted?
- Is the setting accessible to all potential participants?
- How should the room be set to enhance the learners experience?

Incongruence of the instructor delivery with the participants needs and learning style can be a recipe for disaster. Understanding participants learning style as it relates to VAK will assist the instructor to adjust instructional strategies to fit the learning styles of the participants. Assessing participants well in advance of a delivery will provide the instructor the time to adjust instructional delivery and is optimal. In many instructional settings involving the adult learner there is very little opportunity to assess participant in advance of instruction. In these settings, the instructor should consider instructional approaches that use all three styles, especially in exercises that reinforce learning concepts.

Kolb’s Theory of Learning Style

“Learning is the process whereby knowledge is created through the transformation of experience” (Kolb 1984)
Phycologist Dave Kolb first outlined his theory of learning styles in 1984 and believed an individual’s learning style was a result of genetic factors, life experiences and the current demands on the learner. Kolb’s model is based on two preference dimensions that give rise to four distinct learning styles. These preference dimensions are perception and processing. The perception dimension is how we think about things. With the perception dimension, people will make preferences along a continuum from concrete experience to abstract conceptualization. The process dimension is how we approach a task. People will take the results of their perceptions and develop their preferences along a continuum of active experimentation to reflective observation. These preferences lead to four distinct learning styles. As related to the process continuum, active experimentation is the synonymous with doing whereas reflective observation is synonymous with watching. As related to the perception continuum, abstract conceptualization is synonymous with thinking and concrete experience is synonymous with feeling.

The learning process is completed when the learner uses all four styles and tests the hypothesis through active experimentation.

The following will provide examples of application of Kolb’s cycle.

**Learning a mathematical concept:**
- Abstract conceptualization - Listening to explanations on what it is.
- Active experimentation – Practicing components through problem solving.
- Concrete experience - Going step-by-step through the mathematical concept.
- Reflective observation - Recording your thoughts about the concept in a learning log.

**Coaching a person to hit a baseball:**
- Concrete experience - Having a coach guide you in coaching someone else to hit a baseball.
- Reflective observation - Observing how other people coach the skill of hitting a baseball.
- Abstract conceptualization - Reading articles to find out the pros and cons of different methods of hitting a baseball.
- Active experimentation - Using the skills you have learned to achieve your own coaching style of hitting a baseball.

**Activity: Match the Activity with Learning Style**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Concrete experience</th>
<th>Reflective observation</th>
<th>Abstract conceptualization</th>
<th>Active experimentation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learning to ride a bicycle</td>
<td>a. Thinking about</td>
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<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>riding and watching</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>another person ride</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>a bike</td>
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<td></td>
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<tr>
<td></td>
<td>b. Understanding</td>
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<td>the theory and</td>
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<td>having a clear</td>
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<td>grasp of the</td>
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<td></td>
<td>biking concept</td>
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<td></td>
<td>c. Receiving</td>
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<td></td>
<td>practical tips</td>
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<td></td>
<td>and techniques</td>
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<td>from a biking</td>
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<td></td>
<td>expert</td>
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<td></td>
<td>d. Leaping on the</td>
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<tr>
<td></td>
<td>bike and have a</td>
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<tr>
<td></td>
<td>go at it</td>
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</tbody>
</table>

**Learning a software program:**

<table>
<thead>
<tr>
<th>Active experimentation</th>
<th>Concrete experience</th>
<th>Reflective observation</th>
<th>Abstract conceptualization</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
a. Jumping in and doing it.
b. Thinking about what you just performed.
c. Reading the manual to get a clearer grasp on what was performed.
d. Using the help feature to get some expert tips and perform a task of the software program.

### Instructional Note

<table>
<thead>
<tr>
<th>The correct responses to the activity follow:</th>
</tr>
</thead>
</table>

**Learning to ride a bicycle:**
Concrete experience - Receiving practical tips and techniques from a biking expert.
Reflective observation - Thinking about riding and watching another person ride a bike.
Abstract conceptualization - Understanding the theory and having a clear grasp of the biking concept.
Active experimentation - Leaping onto the bike and have a go at it.

**Learning a software program:**
Concrete experience - Using the help feature to get some expert tips and perform a task of the software program.
Reflective observation - Thinking about what you just performed.
Abstract conceptualization - Reading the manual to get a clearer grasp on what was performed.
Active experimentation - Jumping in and doing it.
Kolb’s Cycle of Learning Preferences

Kolb’s Cycle of Learning Preference

- **Accommodating (Feel and Do)**
  - Concrete Experience
- **Active Experimentation**
- **Converging (Think and Do)**
- **Abstract Conceptualization**
- **Diverging (Feel and Watch)**
  - Reflective Observation
- **Assimilating (Think and Watch)**
Kolb’s learning preferences are made up of a blending of how you perceive (think or feel) along the abstract conceptualization – concrete experience continuum and how you process (do or watch) along the active experimentation – reflective observation continuum and result in four quadrants.

Diversers. Diversers can be categorized by the terms feeling and watching. Diversers fall into the quadrant of the concrete experiencer and the reflective observer. They take experiences and think deeply about them, thus creating a divergence from a single experience to multiple possibilities in terms of what this might mean. Diversers ask why and generally start with the details and work towards the big picture. Diversers enjoy working with others and like a calm environment. Diversers do not deal well with conflict.

Assimilators take the most cognitive approach to learning – preferring to think than to act. They prefer lectures over activities and may not enjoy games or a playful learning environment. This learning preference may pull multiple observations and thoughts into an integrated whole. They prefer lectures and instructor-led demonstrations.

Convergers will think about things and try out their ideas to understand how things work in practice. They like facts and will seek to make things more efficient by making subtle changes. Convergers tend to work by themselves and act independent of others.

Accommodators take a hands-on approach to learning and enjoy doing rather than thinking. They are bored with the routine and may often be the risk-takers of the group. They generally enjoy learning by themselves.

The instructor should describe the learning preference slide first by reviewing the stages of learning as created by how you perceive - think or feel, and how you process - do or watch. The four quadrants are created by the blending of a process stage and a perception stage. It is important to understand how each of these preferences relate to the learner and how the instructor can utilize these preferences to enhance the learning experience.
with a high-level approach and drill down into the details, never losing sight of the big picture. They are generally considered the serious learner and may not enjoy games or a playful learning environment. Assimilators also enjoy work that involves planning and research.

Convergers. Convergers can be categorized by the terms thinking and doing. Convergers fall into the quadrant of the abstract conceptualization and active experimenter. They will think about things and try out their ideas to understand how things work in practice. They like facts and will seek to make things more efficient by making subtle changes. Convergers tend to work by themselves and act independent of others. E-learning may be preferred over other learning processes.

Accommodators. Accommodators can be categorized by the terms doing and feeling. Accommodators fall into the quadrant of the active experimenter and the concrete experiencer. They have a hands-on approach to learning and enjoy doing rather than thinking. They ask “what if?” and “why not?” in support of their action first learning style. They are bored with the routine and may often be the risk-takers of the group. They generally enjoy learning by themselves. They are good at thinking on their feet and changing their plans spontaneously in response to new information. When solving problems, they typically use a trial-and-error approach and people with this learning style often work in technical fields or in action-oriented jobs such as sales and marketing.

Kolb’s model of learning styles and preferences form the basis of experiential learning. The importance of Kolb’s work is that learning is a continuous process and should not be considered by outcomes. As such, learners may lean towards a certain preference but experiential learning should focus on the cycle that involves the four processes of concrete experience (feeling), reflective observation (watching), abstract conceptualization (thinking) and active experimentation (doing). This is a continuous process where the learner can enter at any given point and complete the four processes in the learning process. There is a blending of the styles along the process and perception continuum to form the four quadrants of learning preferences. A learner may lean towards one style and preference over others, but they will use all styles and preferences in the learning process. The challenge of the instructor is to not mirror their own preferred learning style or preference in the instructional process. The instructor should use the four learning styles and four learning preferences in the instructional setting, focusing on the best style and preferences for the material being presented.

<table>
<thead>
<tr>
<th>Instructional Note</th>
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</thead>
<tbody>
<tr>
<td>Design learning to fit the material and the instructional setting. As with Kolb’s model, the importance is that learning is a continuous process and should not be considered by outcomes. The model depicts a continuous process where the learner can enter at any given point and complete the four processes in the learning process. A learner may lean towards one style and preference over others, but they will use all styles and preferences in learning. The instructor should use the four learning styles and four learning preferences in the instructional setting, focusing on the best style and preferences for the material being presented.</td>
</tr>
</tbody>
</table>
Set Clear, Meaningful Objectives with a Plan to Meet Them

Learning Objectives

- Contract between the instructor and the learner
- Must be learner-focused, not instructor-focused
- Answers the question: “What will participants be able to do upon the successful completion of the learning session?
- “What’s in it for me?”

The self-directed adult learner must control their learning experience. They need to understand why the material has relevance in the context of professional, social or personal growth. A learning objective should be considered a contract between the instructor and the learner. The instructor understands what they are expected to deliver and the learner understands the expected outcome in terms knowledge, skills and attitude of the learning session in clear, measurable terms. Learning objectives should answer the following question:

What will participants be able to do upon the successful completion of the learning session?

Note: “Able to do” must be related to learning. Therefore, “do” can be substituted for accomplish a stable and persisting change in knowledge, skill or attitude.

Much of the instruction that occurs is the work of instructional designers and learning objectives follow the subject matter. This does not preclude the instructor to make relevant the objectives to the learner by providing some lead-in examples answering the question of “what’s in it for me?”. There should be a presumption that learners have entered into the instructional setting primarily due to the fact that the subject matter has importance. It is then up to the instructor to express the learning objectives in such a way that the learner understands the relevance of the material from their perspective.
There are several models used to establish objectives. A common model is the SMART Model. This model was developed by George T. Doran in 1981. The acronym can be broken down as follows:

**Specific:** Use clear, direct language and tell the learner what they should expect to be able to do as a result of the training session.

**Measurable:** As you set objectives, it is important to realize that there are certain actions that cannot be objectively measured. The objective must be written so that any objective observer could watch the learner’s performance and agree if the objective has been satisfied or not.

**Achievable:** Learning objective must be something your learners have a chance of completing/satisfying. The adult learner must have enough pre-existing knowledge, time, and similar resources. Conversely, don’t make objective too easy so that the learner is not challenged and engaged.

**Relevant:** The objective must have value to the learner. If your objective must answer the question “what’s in it for me?”.

**Timely and Time-bound:** Make sure the object describes a gained knowledge, skill or attitude that can be used in a timely fashion. Learning that focuses on a current problem facing the adult learner will be more effective. Lastly, the objective must have time bounding. This means that it the objective, if met will be accomplished within a given time period.
Learning Objective Construction

Intended Audience-Action Verb-Standard-Condition

At the end of Module 2, participants will be able to prepare a line list using complaint intake forms to assess foodborne disease in the community.

Instructional Note

Explain to participants that the intended audience are the participants; the action verb is “prepare”; the standard is a “line list” and the condition is “assess foodborne disease in the community”. Mention to the participants that based on the action verb that this objective calls for higher-level learning and this will become evident with the next slide describing action verbs.

Strong learning objectives generally will have four factors and will tie the learning objective back to the SMART model. The four factors are:

Intended Audience - Action Verb – Standard - Condition

The intended audience which is the participant or learner. An action verb which states precisely what the learner will do following successful instruction. A standard that will tell how the learner will perform. A condition which will describe relevant factors associated with a desired outcome.

The following is a diagramed learning objective using the four factors and incorporating SMART Objectives.
At the end of Module 2, participants will be able to prepare a line list using complaint intake forms to assess foodborne disease in the community.

Audience = Participants

Action Verb = Prepare

Standard = A line list using complaint intake forms

Condition = Assess foodborne disease in the community.

It meets SMART objectives as it is specific (prepare a line list), measurable (line list), achievable (if the Module content supports the objective), relevant (if the participants are in a foodborne outbreak delivery) and time limited (by the end of Module 2).

Central to the concepts mentioned above are the “Action verbs”. These verbs are used to describe a particular cognitive level (remember Bloom’s taxonomy?) when writing learning goals. Some examples of such verbs

- **Remember**: Recognize, Identify, Match, List, Define, Name, Select, Describe, Recall
- **Understand**: Associate, Define, Explain, Summarize, Describe, Paraphrase, Discuss
- **Apply**: Apply, Distinguish, Operate, Utilize, Perform, Discover, Modify, Construct
- **Analyze**: Analyze, Classify, Determine, Inspect, Recognize, Compare, Compute, Solve
- **Evaluate**: Appraise, Choose, Conclude, Describe, Judge, Rate, Score, Evaluate, Justify
- **Create**: Arrange, Build, Create, Design, Produce, Rewrite, Specify, Develop, Formulate
Evaluate Your Plan and Adjust as Necessary
Evaluation or assessment must be integrated into all instructional strategy. Assessment may be broken down into the following three components:

Monitoring Learner Engagement
The adept instructor will constantly assess learner engagement during instruction and make adjustments as appropriate for the material being delivered. Assessment of learner engagement may not be a direct measure of the expected outcome of learning but clearly it is a measure of instructor competence.

Instructional Note
In the example above, the action verb “prepare” was used. Ask the participants which cognitive level the action verb “prepare” would be found. Prepare would be a verb at the create cognitive level.

The following two slides are quick activities to engage the learner. Upon advancement to the slide, only the title will be shown. Ask learners to respond to what verbal or non-verbal traits would be observed with the engaged learner and the disengaged learner. Make it fun. Ask for demonstrations.
The following lists are verbal and non-verbal cues that the learner is engaged in the process and the outcome of the learning session will be positive:

- Head nodding
- Smiles at concepts
- Participant makes eye contact with the instructor
- Asks relevant questions
- Shares experiences applicable to the material be presented
- Leans forward, looks attentive
Some verbal and non-verbal cues that may indicate that learners are disengaged and different tactics may be necessary to engage the learner:

- Appears distracted
- Talks with neighbors
- Crosses arms
- Yawns
- Drums fingers, writing instrument or something else
- Not attentive to time management – shows up late from breaks

**Assessing Learning Session Outcomes**

At this level, the instructor measures, or attempts to measure, how much the learners learned. This may equate to understanding if the learning objectives were met and may be measurable by the output of exercises, outcome of any knowledge checks/quizzes or direct questioning of participants on key concepts or objective of the course or session delivery. Assessment at this stage should be considered as a prompt for the instructor to change delivery strategies if it is possible within the scope of the delivery. Assessment tactics will be discussed in the next module.
Building a Safe Learning Environment

Building a Safe Learning Environment

- Address participants by name and make sure you are pronouncing their name correctly
- Be careful not to focus on a person or a group of people while ignoring others
- Ask participants for their thoughts and acknowledge their contribution
- Be sensitive to racial and cultural differences
- Recognize disabilities in participants and make appropriate accommodations

How do you build a safe learning environment? You first need to recognize the components that go into a safe environment. It is important to foster a learning environment in which participants feel safe, relaxed, and willing to take risks, especially for learners who may have had negative experiences in traditional classroom environments. Participants often describe supportive learning environments as expanding their sense of family and enhancing their self-esteem.

A safe environment gives participants an identity and makes them feel welcome. Address participants by name and make sure you are pronouncing their name correctly. Don’t wait to be corrected if you mispronounce a name. Use name tent cards for participants and when a unique name is observed ask the participant how their name is pronounced. This makes a powerful statement to participants that you care. Make eye contact with participants and be careful not to focus on a person or a group of people while ignoring others. Be friendly with participant in and out of class.

Ask participants for their thoughts about a subject being discussed and acknowledge their contribution. Participants will feel respected and will not feel that they have a subordinate relationship with the instructor. Be prepared to present all sides of an issue and present all views regarding a subject as worthy. Don’t let participants in the minority opinion feel like that are being singled out and ganged up upon.

Be sensitive to racial and cultural differences in the instructional setting. Address participants that appear to be creating tension relating to racial and cultural difference. Confront bigoted jokes or slurs wherever you encounter them. Don’t tolerate the use of language that discriminates against any person. The instructor must serve as the role model when establishing the learning environment’s normative values for discriminative activities.
Recognize disabilities in participants and make appropriate accommodations. Don’t be overly engaged with the disabled participant, treat them with the same respect afforded all participants.

In conclusion, a safe learning setting starts with the instructor. Through their actions they establish the expected behaviors. The adept instructor will read body language to understand if they are disengaged due to the subject matter as well as if they feel comfortable and safe in the learning setting.

Summary

- Understand the motivation factors of the adult learner
- Identify tactics or strategies utilized in the adult learning process
- Identified how to set meaningful learning objectives
- Recognize and monitor learner engagement
- Creating a safe learning environment

This module focused on understanding and applying instructional strategies to enhance the adult learning experience.

- Explain the motivation factors of the adult learner
- Identify tactics or strategies utilized in the adult learning process
- Explain how to set meaningful learning objectives
- Recognize and monitor learner engagement
- Describe the elements that contribute to a safe learning environment
Module Objectives

By the end of this module, participants will be able to identify the factors that go into an effective delivery.

- Recognize the personal attributes of an effective instructor
- Identify positive presentation skills
- Describe tools used in the instructional setting
Performance Objective
By the end of this module, participants will be able to identify the factors that go into an effective delivery.

Enabling Learning Objectives
By the end of this module, the instructor shall accomplish the following learning objectives in support of the performance objective:

- Recognize the personal attributes of an effective instructor
- Identify positive presentation skills
- Describe tools used in the instructional setting

An instructor will be defined by their aptitude

Aptitude is a multidimensional concept. Not only is the term used to define knowledge, it also describes talent, skill, ability, capacity and gift. Effective instruction and delivery skills, herein referred to as presentation skills, may be as important as the material being presented.

The adult learner is characterized by constantly evaluating the instructor – either consciously or subconsciously (Module 2). The key component to instructor effectiveness commences with credibility. This credibility will affect how well the learner will receive and assimilate information delivered in the training.

The following material will reinforce the material on instructor competencies in Module 6. The following is a list of characteristics that demonstrate credibility of the instructor and desired presentation skills.
Instructional Note

The aptitude slide content should be mentioned but not discussed in depth. Mention to the participants that each will be discussed in the slides that follow.
The adult learner must feel that the instructor has sufficient knowledge and expertise to teach the material to be presented. The adult learner values years of experience as well as a demonstration of the quality and depth of knowledge of the instructor. The instructor should explain their background at the beginning of the training. Their description should be tailored to the participants and answer the question: “What’s in it for me?”. Not only should the knowledge of the subject matter be explained, the instructor should also acknowledge if a peer-to-peer relationship exists. Conversely, the introductory statements regarding subject matter expertise must not create a divide between the instructor and the participants by establishing a hierarchical environment where the participants are made to feel inferior. This subordinate relationship will not foster a positive adult learning environment.
Instructors must be dressed appropriate for the learning environment. In general, the instructor must be dressed in a manner that is slightly more professional than the participants unless instructor clothing is dictated by the setting. Clothing should be comfortable. Avoid wearing clothes that are distracting. Put the cell phone away and engage with the participants.

Activity
This is a whole class activity that will involve the next three slides.

Willing participants will be provided a card with the slide title and a mannerism or trait to be expressed. At the appropriate point during the instruction, participants will be called upon to demonstrate.
The next three slides present material regarding nonverbal communication, use of voice and movement during a presentation. Ask for volunteers to assist with the activity. For this activity, participants will be handed a card with slide title and mannerism or trait to be expressed on the other side of the card. At the point on the slide where the concept is introduced, ask the participant(s) with the card to stand and demonstrate what is on the card to the other participants.
Good posture communicates confidence and control. You should stand or sit up straight with your shoulders up.

Pay attention to what your body may be communicating while presenting. Move your feet to face the person to whom you are talking. Twisting your body without moving your feet towards the person you are talking with sends the message that you are not fully engaged.

Don’t let your facial expressions contradict your verbal delivery. We communicate with facial expressions well in advance of our ability to communicate verbally.

Genuinely smile. A genuine smile will have a positive effect on the instructor as they will feel better. Conversely, be aware of facial expressions that may be perceived by the recipient as negative. Some smiles may be perceived as fake by the audience, and the negative impact of a forced or faked smile may cause the participant to feel disparaged. Learn to express positive and calming body language and that, in turn, will calm the more detrimental facial expressions that may undermine effective instruction.

Observe your facial expressions in the mirror and practice your expressions with others. Talk with a trusted confidant regarding what your facial expressions are communicating to others around you.
Your voice carries much more than subject matter. The appropriate use of verbal communication elements will deliver the message more effectively.

Verbal Communication Elements are:

- **Enunciation**
  - Speak clearly and distinctly. Avoid mumbling. If the listener has difficulty understanding what is being said, they may tune out.

- **Projection**
  - Speak at a volume that recipients can hear comfortably. Don’t speak too loudly as it may result in recipients becoming uncomfortable and, conversely, don’t speak so softly that they can’t pick up what is being said and tune out. Avoid rapid changes in volume as it may have an unintended consequence of surprise and loss of retention.

- **Modulation**
  - Give emphasis to specific words in your sentences when you want to make a point by changing your tone or pitch.
  - Do not speak in a monotone as it may result in participants losing interest in the presented subject matter.

- **Cadence**
  - Vary the speed of your delivery. Do not talk too quickly or too slowly. Both extremes will lose the attention of the audience. Slow down to make a point. The slowing of your voice will be picked up by participants.

- **Pause**
  - Pausing during the delivery provides an opportunity for participants to absorb the message. It is also an effective way to move to another theme and it can build
anticipation. It’s a necessary part of delivery and may be an effective tool of overcoming the use of filler words.

Movement

Don’t be a tree

Gestures

Synchronize movement

Minimize speaking while moving

Move around the instructional setting, if possible. Don’t limit yourself to standing behind a lectern. Present to the entire group with your voice and gestures. Avoid pacing back and forth while presenting. Avoid making substantive points as you move as it may make it difficult for participants to pick up key points as you move.

Gestures are okay but be aware of the possibility that they may have a negative impact if exaggerated to the point of absurdity. Avoid moving your arms way above your head or waiving or flailing your arms.

A remote clicker for presentations can be your ally during instruction. It tends to relieve at least one of your hands from distracting activities. Keep your hands out of your pockets as it tends to send a message of insecurity to participants.

Body movements must be synchronous with what the vocal instruction. Asynchronous messaging between the voice and body will confuse participants and result in a message delivery failure.
What Intimidates You?

The thoughtful instructor establishes a rapport or relationship with the participants. As you review the skills listed above, use them to establish a rapport. These skills, when used in the extreme may intimidate the participants and cause learning failure. Intimidating actions such as raising your voice without any instructional rational or looming over a participant with arms raised causes alarm and will most likely lead to participants moving into “shut down mode”.

Another important point as you establish a relationship with participants is to ask first prior to putting someone on the spot. During breaks, approach participants with your request if you feel it may be out of a comfort zone. Adult learners will be all over the spectrum with participation based on previous life experiences. Read your audience, the kinesthetic learners may be more apt to accept assignment whereas the auditory learner may be more reserved – especially if asked to read aloud.
Fun and the Use of Humor

Fun and Humor

- More learning occurs when the instructor is clearly and visibly enjoying instruction.
- Humor
  - May reduce anxiety and stress
  - No politics
  - Don’t be overtly self-deprecating
  - If you are not funny, that’s okay
  - Nothing ethnical or sexual

The adult learner is always assessing the instructor. What do you want them to see? The instructor that is clearly and visibly enjoying instruction will engage the learner and, undoubtedly, more learning will occur. Be energetic and show enthusiasm. Prepare to have fun as it does not come naturally to everyone. Having fun does not have to, and oftentimes should not result in, “falling out of your seat” laughter. The instructor that focuses on involvement and participation will build a fun learning environment.

The use of humor during instruction can reduce anxiety and stress in the instructional setting. Conversely, it can be dangerous and oftentimes should be avoided if it not a well-practiced instructional tactic. Remember, a sense of humor is just that – a sense. You don’t know how participants will react to humor and it may be considered offensive. Developing a rapport with your audience that includes humor should follow these principles:

- Stay away from political jokes or comments thought to be funny.
- Humor should not be self-deprecating. A little humor regarding oneself can have a positive effect to show that you are, of course, human.
- Don’t force humor. It is okay if you are not funny.
- No canned jokes. There are more appropriate ways to break the ice than to tell a joke.
- Avoid comments of an ethnical or sexual nature in an attempt to be humorous.

Questioning

Questioning may be one of the most powerful tools with the adult learner. It is an opportunity to draw the learner into the subject matter being delivered. Questioning can be used by the instructor to add to instruction or it may be used by the participants to gain further knowledge.
Questioning by the Instructor

Questioning by the Instructor

Engage | Assess Understanding | Challenge

Content
- Remember and Understand

Process
- Analyze, Apply, Evaluate and Create

Instructional Note

Slide 13 is filled with content. The instructor should first mention to the participants why we use questioning – engage, assess understanding, and challenge. Discuss content questions as closed-ended that prompt short answers such as yes-no, true-false – good for knowledge checks. Discuss process questions as questions that are open-ended intended to develop thinking skills. Ask if they recall where they have seen remember, understand, analyze, apply, evaluate and create? It puts questioning into Bloom’s hierarchical ladder.

Questioning by the instructor is a technique that engages the participant, assesses understanding, and challenges participants to delve deeper into content. Questioning can pose a problem to be solved, something relevant to the adult learner. There are generally two types of questioning used by the instructor. Process questions tend to be open-ended and systematic as they probe for information gaps and tend to develop thinking skills of the participant. Content questions tend to be closed-ended (yes-no, true-false) are good as knowledge checks but not much more. Content questions are not intended to develop thinking skills and move participants to higher-level learning. In the context of Bloom’s hierarchical ladder, content questioning can assess if you remember or understand.
Process questions lead to higher-level learning and the competent instructor will use process questioning as a formal part of their presentation and spontaneously wherever possible to support the subject matter being delivered. Process questioning can move you up the ladder to analyzing, applying, evaluating and creating. Process questioning should have the following attributes:

- Have purpose. If we are to understand what type of output we are looking for, we can structure questions that help us get there. Process questions can be structured in the following way:
  - With this concept in mind, how would you apply it to resolve the issue?
  - With this thought in mind, could you analyze the following situation and create an alternative mechanism to solve the problem?
- Be organized for maximum effect. This may mean that questioning could follow Bloom’s hierarchical ladder or pose questions that support higher level questioning.
- Involve as many learners as possible. A team creating a solution to questioning is far better than any one person answering. Clearly, this supports engagement.

Questioning should never be used to badger, belittle or intimidate participants. Questioning should not create subordinate – superordinate relationships between participants and instructors and will lead to negative consequences.

Questioning by the Participant

- Give them permission if necessary
- Take questions throughout the session – check for learning
- Don’t patronize or intimidate
- How do you handle the question you can’t answer?
- How do you stop questioning when pressed for time?

Does your presentation style encourage active participation? If it does, you will certainly encourage questioning by the participants. Take an opportunity near the beginning of instruction to discuss participant questioning. It may be best to accept questioning when a theme in subject matter changes or near the end of a session as long as a question and answer session is predetermined at that point. Don’t wait until the summary and conclusion to take questions. If you know you are dealing with difficult subject matter, scan and check for knowledge. If participants look confused, ask them if they have any
questions on the subject matter. Invite questions at those times by starting the invitation for questions in the following manner:

- I understand that this may be a difficult concept to grasp...
- We have not spent much time on the subject of...

Stay away from initiating the invitation of questioning in the following manner:

- You look dazed and confused...
- Apparently, I did not think this was a concept that was over your heads...

Be professional in your approach to inviting questions. If they look dazed and confused it may be the presenter.

What if you do not know the answer? The clearest way to handle this situation is to be honest and tell them you don’t know. If you clearly do not know, ask other instructors or participants to answer. If you are just drawing a blank, tell them that you will get back to them or see me at the break. Don’t give an answer you know is incorrect. Participant will know you are wrong and credibility will be lost.

Don’t let participant questioning be the demise of time management. Plan to finish on time. Presentation timing should include time for questions by participants. If you have participants sucking the time away from your instruction, then you need to address the participants and move on. How to deal with the “time suckers” will be addressed in Module 5. If the apparently undue questioning is a result of an inadequately prepared instructor, then PREPARE!

Tell the Story

The incorporation of stories in instruction can be a powerful tool to reinforce the subject matter. A story may be an example of how the subject matter applied in a certain situation, it may be a personal story supporting the subject matter or it may be the hook – the “what’s in it for me” story that engages the participant.

Whenever possible, use your own story. Unless you give permission, you own it and it will not be repeated. It remains unique to you. Telling your own story should reduce your fear of presenting as you should be comfortable with the subject and at ease sharing with others.

Activity: Find your Story
Stories can be a powerful tool to reinforce subject matter. Telling your own story may reduce your fear of presenting as you become comfortable with the subject matter. Use any of the listed concepts (or one of your own choosing) and build your personal story to reinforce the intended learning outcome:

- Importance of collecting a stool specimen
- Product tracing of a recalled food
- Importance of finding additional cases
- Preserving clinical samples correctly
- Environmental assessment leading to positive findings
- Using the proper form during an epidemiologic investigation
- Taking appropriate legal action based on investigation findings
- Others...

Putting the Skills to Work

“Some instructors are born presenters”. This thought should be washed from your consciousness as it infers that not everyone with the inclination can be an instructor. First and foremost, all instructors are born and most instructional skills are learned behaviors. Yes, there are certain human traits that make some instructors better presenters than others, but everyone can be better instructors by employing the skills provided above. The competent instructor has practiced these skills more than the instructor moving up the competency ladder. Practice. Practice mentally. Practice in front of a mirror. Practice on your friends and family. Practice on your colleagues.
Instructional tools are a means to support the learning process. The intention of using instructional tools as well as embedded exercises and instructor skills is to blend instruction to meet the needs of learners from a sensory perspective. Instructional tools should support instruction. They should not be used to compensate for poor instructional skills. Common Instructional tools to be mentioned here are presentation slides, easel pads and white boards, handouts and props, and audio and video.
Slide 4-17 is purposely constructed in this fashion to demonstrate how not to build a presentation slide. The instructor should use the slide to talk to these important points with construction and delivery:

- Background and design should reinforce the mission
- Colors and branding should be consistent throughout
- Slide text should be clear, concise and easy to read
- 1-6-6 Rule of one idea, six lines and six words per line
- Avoid continuation slides
- Images should have relevance and be of high quality
- Royalty free or own it
- Know your slide – be prepared
- Set the computer screen so that it can be seen by the instructor – prompting
- DONT READ SLIDES! Slides are prompts, not props
- 30 – 90 seconds per slide
- Black the screen

When the screen is blacked, remind the participants that evaluations focus on the instructor and even the most well-constructed slide will not take the place of a competent instructor.
Usually generated with PowerPoint or Google Slides, the presentation slide is a projection from a computer on to a screen. The presentation slide can be an important tool to reach all learners if the following rules are followed:

- Choose slide design and background to meet the needs of the learner and reinforce the mission, goals and objectives of the instructor. Keep colors, branding and design consistent throughout the presentation slides. Formatting of slides should be consistently applied so that learners don’t become confused or uncontrollably drawn to inspection of the slide and lose focus on content.
- Take it easy on effects and transitions as the use (or overuse) does very little to enhance the experience of the participant.
- Think about a visual prompt on the slide to indicate topic transitions. Oftentimes, the instructor will advance a slide and be caught off-guard with the change in transition to another topic and forget to form the bridge necessary to transition.
- Slide text must be clear and concise. Text should be crafted so as not to overwhelm the learner. If the learner is drawn to reading the text, they may lose an important message delivered by a skillful instructor. Text should support key concepts and may be in a bulleted form so the learner can visually understand how the concepts are organized by relevance. Presentation slides should follow the 1-6-6 rule. That is, one idea per slide with six lines of no more than six words. This rule should be a guide to the maximum text allowed on a slide, not the norm. If all slides in a presentation had a title, six lines with six words, participants could easily become bored and easily distracted away from the presentation slides. Just as we attempt to minimize the run on sentence, we should minimize the run on slide. Don’t have multiple slides where the tile of the slide ends in “-continued”. Change the title to fit the theme, even if it is just a subtle change.
- Use high-quality and images relevant to the presentation. Don’t throw graphics on a slide just to fill space. Images used should be of a resolution that makes it clear what the learned is visualizing. Images should not invoke an “ink blot” exercise with the learner! Always ensure that you own the rights to use an image or use royalty free images.

Presentation Slide Delivery
Don’t let the presentation of the meticulously-crafted slide ruin the entire learning experience. How many in-person course evaluations state that the presentation slides were great but the instructors could have been stronger? Generally, the focus is on evaluating the instructor and, as mentioned earlier, the presentation slides support good instruction. The following are some tips in delivering presentation slides.

- Be prepared. Adult learners will pick up on the underprepared instructor. Understand your slide, recite text that is so conceptually relevant that it must be stated verbatim. Paraphrase text that is wordy – especially if it is embedded with an image as it may be a smaller font and difficult to read. Know your next slide and form a bridge between the slides whenever possible.
- In support of the first bullet, set the computer screen so that it can be seen by the instructor. Minimize turning your back to the participants to read a slide. Use a wireless mouse so that you don’t have to return constantly to the computer to advance slides.
• Don’t spend too much time on a slide. Generally, a slide should take 30 to 90 seconds to deliver. If the content or concept of the slide takes much more time you may want to consider other tools and tactics to be described later.

• Black the screen. Blacking the screen should make the inaudible statement of focus your senses on the instructor. This can be a powerful tool in instruction as it may allow the instructor to use another tool or when the focus of instruction is a story.

Easel Pads and White Boards

Easel Pads and White Boards

“The Blank Canvas”

- Lists and parking lot items
- Write in large block font whenever possible
- Color is fine but make sure you have good contrast
- Stand to the side, preferably on the left side
- Don’t destroy walls with the wrong tape or markers

Easel pads and white boards should be considered a blank canvas to the instructor. The skillful instructor will use the easel pad and white board (the canvas) to take a break from the presentation slide. The canvas can be used in a pre-planned manner or spontaneously to capture thoughts of the instructor and participants – especially key concepts that may be referred to later in presentations. The canvas is an effective way for participants to provide the output of exercises to be shared. Some tips when using the canvas in the learning setting are provided below.

• Write with large font. Make sure that text and graphics displayed on the canvas can be seen from all points in the room.
• Use color markers but be sure they have enough contrast to be visible from all point in the room.
• During instruction try to stand off to the side, preferably to the left of the text or graphics. Instructor obstruction can be frustrating to participants and since we read from left-to-right, standing at the origin of text is preferred.
• If you plan to tape easel pads to the wall, be sure you use tape that will not leave glue residue behind or pull paint from the wall. It is amazing the damage the wrong tape can do to the instructional setting! Also, make sure makers do not bleed through paper and on to the wall.
If you wish to make a presentation more dynamic, increase its richness or just break up the monotony of a presentation, consider the use of audio and video. Something as simple as narrating long text associated with a scenario or exercise can be impactful to the audible learner. Video can be used to reinforce learning concepts and provoke discussions. Some tips to incorporate audio and video follow:

- Don’t overuse the media. Audio and video can be rather passive and may remove the participant from an active learning environment.
- Audio and video should be short in length and contain short chunks of information. The media should be used to capture the learner’s attention.
- Videos should be of high-quality. The learner should not only be drawn to the content of the video, they should admire the professionalism of the media and have an appreciation of the time and effort put into the incorporation of the media.
- Make sure you have permission to use canned audio and video.
- Audio and video can be large files and not easily managed in presentations. Wherever possible, files should be embedded in the presentations and started with the click of a mouse. If you plan on downloading files from an e-location, make sure this is available from the instructional setting.
- Have a “Plan B”. If the media fails do you have an exercise that can be substituted to fit the instructional plan?
There may be some material that is not easily incorporated into instructional material. Handouts and props are material that is used to support learning or to support the mission, vision and goals of the instructor/instructional organization.

A handout is a paper-based resource used to supplement material used in the learning process. A handout may be as simple as a worksheet or it may be copyrighted material that must be used in its entirety. Books or guidelines provided to support instruction may fall into this category. A handout may be very useful but will add to the learner’s burden of paper management. Use handouts judiciously and only when necessary to support learning.

Consider a prop to be a three-dimensional picture with tactile properties. Props are very important in the process of learning a skill. In Bloom’s hierarchical ladder it represents an opportunity to move into higher-level learning such as applying and assessing. Props can be very important but, once again, add to instructor and learner’s burden of managing more instructional material. Consider the logistics of utilizing props in the learning process.
“I hear and I forget. I see and I remember. I do and I understand.”

– Xunzi (300 – 230 BC)

Xunzi (pronounced “shun-zih”) was a Chinese philosopher and one of the great Confucian philosophers. This is probably a loose translation of the original proverb.
Summary

This module focused on the factors that go into an effective delivery.

- Recognize the personal attributes of an effective instructor
- Identify positive presentation skills
- Describe tools used in the instructional setting
Coming Up Next

Challenges to Effective Instruction
Instructional Training for the Public Health Professional

Challenges to Effective Instruction

This module will identify physical and human challenges associated with instruction and provide ways to overcome challenges.
Module Objectives

By the end of this module, participants will be able to identify challenges to effective instruction and determine methods and tactics to overcome them.

- Recognize physical challenges in the instructional setting
- Determine the best way to arrange a room for optimal learning
- Describe participant/learner challenges
- Determine methods to overcome challenges with the participant/learner

Performance Objective

By the end of this module, participants will be able to identify challenges to effective instruction and determine methods to overcome them.

Learning Objectives

By the end of this module, the instructor shall accomplish the following learning objectives in support of the performance objective:

- Recognize physical challenges in the instructional setting
- Determine the best way to arrange a room for optimal learning
- Describe participant/learner challenges
- Determine methods to overcome challenges with the participant/learner
When we consider the optimal learning environment, we must consider the characteristics of the adult learner and their expectations in a learner-centered environment. The adult learner expects a comfortable setting in which to learn. Comfort is a state of being which takes into consideration the physical aspects of the learning setting. Physical aspects of the environment may have a profound effect on learning. Things to consider:

- **Temperature of the instructional setting.** Temperature is a concrete measurement. Feeling warm or cold is more relative measurement of comfort. Remember, the instructor is moving and generating warmth. The instructor should not set the temperature for their comfort as it may not be a reflective of the participant’s comfort. Observe and assess the learners to understand a comfortable temperature for the majority of the class. Remember that there may be limitations to adjusting temperatures. Work with the POC for the delivery to get a better understanding of temperature control. Be upfront with the participants about how much control over temperature is available and suggest they dress for comfort.

- **Lighting in the instructional setting.** The challenge to instructors is to reduce the lighting so that presentation slides are easily visible while maintaining enough light for the learner to see the printed material in front of them. Poor lighting may have a dramatic effect of the learner causing distraction from the subject matter. If the lighting appears questionable through the instructor personal feeling as well as by what is being observed in the participants, adjust lighting to gain consensus with the majority of the class.

- **Handicap accessibility must always be considered when establishing a place for instruction.** Accommodations must be considered and established

- **Seating and table arrangement in the instructional setting.** If you want to move participants to the front of the room, place the comfortable chairs up front. When given the choice between a
comfortable chair and a less comfortable chair, the adult will choose comfort. There may be no way to control the type of chair available but, if possible, use the same chair for all participants. If this is not a possibility, vary the chairs throughout the room. Table setting can be very important in a learning setting and may be indicated by the type of instruction delivered. A few of the more common setups are provided below.

Seating and Table Arrangement

Theater Style

- Suitable for Seminars and Lectures
- Shorter Presentations
- Not a setup for Notetaking

Theater style setup. Seats are oriented in rows with no tables. This style of arrangement may be suitable for seminars or classic lectures, preferably for shorter presentations where notetaking is not considered a high priority.
Classroom Style

- Good for conducting traditional classroom activity
- Used for lecture and training

Classroom style setup. Rows of table and chairs face parallel to the front of the room. The table provides space for each learner to conduct classroom-related activities. This type of setup is used lecture and training.

Chevron Style Classroom

- Participants pointed toward instructor
- Effective style for lecture, training and instruction
Chevron style classroom setup. Tables and chairs are arranged in rows slanted inward to form a “V” and separated by a center aisle. Tables are set perpendicular to the point where the instructor is located creating a focal point. This is an effective style for lecture, training and discussion.

Cluster or Pod Style

- Participants pointed toward instructor
- Participants clustered in a “U” shape
- Effective for lecture, training and team building

Cluster or pod style setup. Grouping of interconnected rectangular tables with participant arranged in a “U” shape facing the instructor. This style is used for lecture, training, discussions and, most importantly, team building.

“U”-Shape Style

- “U” is open to instructor/presenter
- Used for seminars, lecture, training and team building
U-shape style setup. Series of rectangular tables connected to form a U with chairs set along the outside of the U. The U is open on the instructor side. This style can be used for seminars, lecture, training and team building.

**Participant/Learner Challenges**

The instructor may be faced with challenges to effective instruction directly by participants.

**Time Management**

In the instructional setting, if you are not managing time you are not managing one your most critical resources. Time management is a shared responsibility of the learner and the instructor.

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**Time Management Tools for the Instructor**

- Practice the material to be presented
- Post a schedule for instruction
- Build in some extra time
- If you run late, make a new “contract” with participants
- Timekeeper

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The instructor that does not manage their instructional time will convey that time is irrelevant to the adult learner that time is irrelevant. This disregard for time will cause a cascading event where learner-participants will disregard start times and extend breaks to the point that instruction time is reduced and essential concepts may be lost to the learner. Some important time management concepts for the instructor follow:

- Understand how much time is necessary for the material to be presented and practice. If you are responsible for a specific set of material to be delivered within a specific timeframe, practice!
- Post the schedule for instruction. This will act as a contract between the instructor and adult learner. As the instructor keeps their time commitment to the adult learner, the adult learner will be more apt to keep their commitments.
• Instruction time blocks should have some extra time built in for learner-instructor interaction and for group discussion. From the learner’s perspective, finishing early is a reward and finishing late feels like punishment – especially when very little learner-instructor interaction occurs.

• If you run late, make a new contract with the adult learner and get back on schedule. If learner-instructor interaction created the lost time, remind the learners of the great interaction that caused the loss of time and that the lost time will be made up without the loss of break time. If the lost time is not a result of interaction with learners, it is likely the instructor had not adequately prepared for instruction and apologies are warranted. It may be possible to modify activities to make up time without losing content. Changing activities from group work to whole-class activities may make up time.

• If you are instructing with others, appoint a timekeeper and go over the cues necessary to keep on time. If the only cue you get is that time is up, your instructional partner has failed you.

The adult learner has an equal share of responsibility in time management. Unlike the child learner, the adult learner is oftentimes managing a family and work while attending training. An adult learner that is not fully engaged will be challenged with managing time as competing priorities may get the best of them. The following activity will identify some time management challenges and address methods that may be used to overcome these challenges.

Activity

This is a whole class discussion that will identify some time management challenges and address some methods that maybe used to overcome these challenges. Space is provide in your manual to record responses.

How do you address the participant that continues to ask questions and take up precious instruction time?

How do you address the participant that is always showing up late from breaks?

How would you address a participant that must miss two or three hours of a two-day training? How much time is appropriate to miss?
How do you address the participant that is always showing up late from breaks?

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Instructional Note

This exercise is a whole class activity to address some time management challenges. The questions are revealed by a mouse click. Once the question is revealed, give the participants a minute to think about the question and call for responses. Encourage participants to record response in the space provided in the manual. Some of the more appropriate response are provided in the instructional note that follows the question.

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Instructional Note

The instructor may want to initially address the participant in the instructional setting and state that these are great questions, but we need to follow the timeframe allotted. Use the parking lot and tell the participant that we will get back to the question as time permits. If the questioning continues, you may need to address the participant on a one-on-one basis. If the questioning is reasonable then the instructor may not be as prepared as they should be!

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How do you address the participant that continues to ask questions and take up precious instruction time?

---
How would you address a participant that must miss two or three hours of a two-day training? How much time is appropriate to miss?

The adult learner is busy and may have other commitments. Missing time within reason is probably acceptable and should be a contract between the instructor and the learner. The instructor should address what material will be missed and make sure the participant understands they are responsible for material missed. The instructor may wish to confer with the Point of Contact as they may have information regarding the participant and their need to miss instruction time.

Missing more than 20% of instruction time is usually not acceptable. Ask participants if they feel that is an appropriate cut off point.
Disruptive Behaviors

Disruptive behaviors are a complex and multifactorial problems. Two of the more commonly identified disruptive behaviors and ways to address the behaviors are provided below. These behaviors must be identified early in instruction and addressed so that the learning environment does not degrade into a miserable setting with poor outcomes for the learners and the instructor.

The Inattentive Learner

Inattentive Learner Behavior

- **Characteristic**
  - Sleeping
  - Excessive Smart Phone Use
  - Leaving Instructional Setting
  - Side Conversations

- **Intervention**
  - Engage the participant with the relevance of the material
  - Negotiate an agreement

Inattentive learner is characterized by behavior that interferes with the learning process due to lack of focus. Although there is no intent by the learner to be disruptive or offensive, their lack of attention draws increasing attention by the instructor as well as other learners. Examples of this type of disruptive behavior would be sleeping, conducting side conversations with other participants, gazing out the window and leaving the classroom.

Overcoming the inattentive learner must start with the instructor. The adult learner must understand the relevance of the subject matter and be able to understand why learning is important. The inattentive learner may need to form a linkage with the instructor – a form of engagement that builds relationally. The instructor should take non-instructional time during breaks and prior to the commencement of instruction to meet and discuss the subject matter with participants. Use these opportunities to understand why they are participating and give them a personal goal or objective that may be met if positive participation occurs. The downfall to this activity is that the instructor may find that the person has no desire to attend the instruction and was forced to attend by their boss with no concrete award for participating. They feel like prisoners and there may be no way to reach these learners. In these situations, and where the outcome of learning will not be measured, it may be best to negotiate an agreement that they remain in class and limit their disruptive behavior to a minimum to respect the other participant that are there to learn. The instructor may even consider moving
inattentive learner to the back of the room so that their actions are not so easily observed by other participants.

The Acting-out Learner

Acting-out is a problematic behavior characterized by breaking rules and being offensive to others. These behaviors are characterized by the outward expression of anger when asked to participate, taking phone calls in the middle of instruction and making derogatory statements about the instruction – including the instructor. This behavior may be the result of temporary stressors in the learner’s life that may have occurred recent to instruction or it may have been triggered in the instructional setting as a result from a learner feeling slighted, ignored, or humiliated by the instructor or by another learner. The behavior may also be the result of a social learning disability and may not be able to learn appropriate behaviors or recognize and modify inappropriate behavior.

Instructor must recognize the disruptive behavior and work towards resolution. It is important to involve other instructors and the POC as appropriate. Make no actions that would make the learner feel threatened and possibly escalate the situation such as raising your voice or getting too close. Everyone will recognize the disruptive learner. Asking the disruptive participant to talk outside the learning setting will be less disruptive than addressing the matter in front of other participants. Be thankful that this escalated behavior occurs infrequently in an adult learning setting but if it does occur a calm, rational approach will be the best chance to de-escalate the situation.
This module identifies some challenges to effective instruction and methods to overcome them.

- Recognize physical challenges in the instructional setting
- Determine the best way to set a room for optimal learning
- Describe participant/learner challenges
- Determine methods to overcome challenges with the participant/learner
Coming Up Next

Instructor Competencies
Some of the material presented in this module comes from the work of the International Board of Standards for Training, Performance and Instruction (ibstpi®). The Board consists of 15 members from various professional backgrounds dedicated to performance improvements relating to training, instruction and learning through the development of competency-based standards.

This module is not intended to present the body of knowledge on instructor competencies. Rather, the intention of this module is to provide an overview of instructor competencies and describe how they are intended to be used to improve the effectiveness of the instructor.

Although the ibstpi® competencies are developed to a greater extent, other models of instructor competency are available and may be used without concern for copyright infringement. The domains, associated competencies and performance statements are available to be downloaded free-of-charge at: http://ibstpi.org/download-center-free/.
Module Objectives

By the end of this module, participants will be able to explain how to use instructor competencies to become more effective instructors.

- Recognize competencies associated with the effective instructor
- Discuss instructor assessment and the course evaluation’s role in instructor effectiveness

Performance Objective
By the end of this module, participants will be able to explain how to use instructor competencies to become more effective instructors.

Enabling Learning Objectives
By the end of this module, the instructor shall accomplish the following learning objectives in support of the performance objective:

- Recognize the domains, associated competencies and performance statements.
- Discuss instructor assessment and the course evaluation’s role in instructor effectiveness
Instructional Note

Although there is considerable content in this Module, it is not meant to take much time. Stick to the slides and the associated content therein. Mention to participants that the Instructor Competencies and Performance Indicators for the Improvement of Adult Education Programs document is provided as an Appendix and mention there is a link to download the competencies and associated performance statements from the International Board of Standards for Training, Performance and Instruction. This download will have no supporting documentation.

The Instructor Defined (ibstpi®)

The Instructor

“An Individual responsible for activities intended to improve knowledge, skills, and attitudes”

- ibstpi®

Instructional Note

This slide and the “ibstpi” is a prompt to inform the participants that a portion of the instructor competencies presented in this module comes from the work of the International Board of Standards for Training, Performance and Instruction (ibstpi). The Board consists of 15 members from various professional backgrounds dedicated to performance improvements relating to training, instruction and learning through the development of competency-based standards.
An instructor can be defined as “Individuals who are responsible for activities intended to improve knowledge, skills, and attitudes” (ibstpi®).

The instructor may be referred to in many ways. Titles such as teacher, trainer, facilitator and tutor have been used synonymously for the instructor. In Module 4 we defined instruction as “fostering the learning process” and instruction’s primary goal is to improve learning hence leading to a stable and persisting change in knowledge, skills and attitude.

Instructor Competencies

“A set of related knowledge, skills and attitudes that enable an individual to effectively perform the activities of a given occupation or job function to the standards expected in employment.” – ibstpi “2003”

Competencies Derived From:

- Instructor Competencies, Standards for Face-To-Face, Online and Blended Settings – ibstpi
- Instructor Competencies and Performance Indicators for the Improvement of Adult Education Programs – Department of Education, Division of Adult Education and Literacy

Instructional Note

This slide introduces two instructor competencies models discussed in this module. The next several slides will discuss the ibstpi® model and the department of education model will be introduced later.

“Instructor Competencies, Standards for Face-To-Face, Online and Blended Settings”

In the simplest sense, competency development may be considered supporting and improving human performance in support of instruction. The ibstpi® (2003) defines competency as:

“A set of related knowledge, skills and attitudes that enable an individual to effectively perform the activities of a given occupation or job function to the standards expected in employment.”
When one considers a person to be competent, they are generally measuring that person by written or conceptualized standards. As stated, some standards may be well defined and be written in doctrine or performance standards and others may be less formal and based in morals, values and culture. All are equally important when considering someone to be competent.

The ibstpi® model of instructor competency consists of three components. There are domains, competencies and performance statements. A domain is a cluster of related competencies with a clearly-identified theme. The ibstpi® model identifies five distinct domains in which eighteen competencies are found. The performance statement associated with each competency is a central component to the model. The performance statement and the competency are structurally the same, the only difference is the level of detail is much greater with the performance statement. It is important to understand that performance statement do not equate to a specific measure. Although the statements are foundational to the demonstration of a competency, there is no set of predefined measures that establish a competent instructor.

The model will be described in the material that follows. A complete set of the ibstpi® Instructor Competencies can downloaded as a PDF from http://ibstpi.org/download-center-free/.

The following presents a generic overview of the ibstpi® Instructor Competencies

<table>
<thead>
<tr>
<th>Domains Associated With Competencies</th>
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<tbody>
<tr>
<td>Professionalism and Subject Matter Expertise</td>
</tr>
<tr>
<td>Prepare for Instruction</td>
</tr>
<tr>
<td>Presentation Skills</td>
</tr>
<tr>
<td>Measuring Effectiveness</td>
</tr>
</tbody>
</table>
Professionalism and Subject Matter Expertise

A competent instructor will seek to improve instructional delivery skills. A competent instructor must be recognized as a subject matter expert in instructional delivery methods and tactics, thus creating a level of credibility for the instructor. They become “believable” and learners will be more attentive to the material. This is accomplished through participation in meetings of professional organizations, reading journals and trade magazines and other self-directed learning activities. The competent instructor will keep well-informed on contemporary learner and instruction skills. The instructor must stay up-to-date on delivery methods with the use of technology such as with face-to-face applications as well as web-based and blended applications of both delivery methods.

A very important characteristic of a competent instructor is credibility. The position as an instructor does not confer credibility. Credibility is demonstrated by exemplifying subject matter expertise as well as some softer characteristics such as personal and social credibility. Subject matter expertise is gain by mastering the content through study and experience. In fact, the adult learner highly regards gained expertise as long as the other aspects of credibility are not ignored. Personal credibility is demonstrated
by respecting the time of the learners by starting and ending on time, admitting errors or omissions and seeking way to make it right and putting forth an appearance that is appropriate in the learners setting. Social responsibility is demonstrated by respecting the opinion of other instructors and learners and creates an atmosphere of respect and trust in the learning setting. The competent instructor avoids making comments that do not respect the culture of the learners.

There are ethical and legal implications for instructor practice. Not only may there be formal law and codes of ethics for the profession, organizational guidelines and policy may also have to be met by the competent instructor. Instructors must be respectful of intellectual property and understand how other’s intellectual property may be utilized. Instructors must understand what may be considered protected information that may be required to register for an instructional delivery and be capable of taking the necessary steps to protect the information. Though sometimes more difficult to enforce than law and policy, the instructor may be required to follow a code of ethics.

A fundamental skill every instructor must possess is to be able to communicate effectively. A competent instructor in a face-to-face instructional setting will use tone of voice, eye contact, gestures, silence, movement, posture and space during instruction to enhance communication. The competent instructor will incorporate active listening skills into their communication patterns. A competent instructor will convey that they are listening to the needs of the learners by paraphrasing comments and questions to show understanding and to draw in the learners as the instructor shows empathy. This competency was discussed in Module 4 on presenter skills.

A competent instructor is constantly managing the learning environment so that the learning process is optimized. This starts immediately by establishing ground rules for instructor-learner interaction as well as the learner-learner interaction. The instructor must be willing to take on and address undesirable behavior as soon as they are observed. The skilled instructor is a time manager, willing to establish appropriate timeframes and assure everyone, including the instructors, adhere to those constructs.
Prepare for Instruction

- Follow the material to be presented
- Adhere to time constraints
- Prepare to modify and adapt
- Prepare for the use of technology

Whether the instructor creates instructional material or presents the work of others, there is planning that must be accomplished prior to instruction. Material created by an instructional designer must be followed through the use of an instructor guide. In certain instances, the guide must be followed closely—especially with doctrine or scientific concepts. Instructional material must be followed but flexibility with providing examples supporting the material may be appropriate and with reinforce competency 4 as it relates subject matter expertise. Instructional competency must be demonstrated by adhering to the specific material to be presented and adhering to the time allotted. The adult learner is keenly aware when content is not followed and time is ignored.

A competent instructor is always assessing the learners and the learning process through observing body motion and asking questions on the material. A competent instructor will modify or adapt appropriate instructional methods, strategies and techniques as necessary to assist with the learning process to the highest extent practicable.

A competent instructor readies themselves well in advance of the delivery. An instructor not prepared will certainly be identified by the astute learner. The instructor must be ready to deliver the material but must also be ready to field questions related to the subject matter. The prepared instructor may have identified other material that supports instruction. Not only does this assist the learner, it supports the concept that the instructor is working towards mastery of the subject matter and establishing credibility.

Another key point in this competency is being prepared to use technology. There is nothing worse than equipment failure or the failure of other technologies. If videos are integral to instruction, has the equipment been tested prior to the delivery. Do the videos run when prompted? Do you have a plan B? Not being prepared to work around troublesome equipment or technology will diminish credibility with the learners.
Presentation Skills

Establishing and maintaining motivation in the learning environment is the responsibility of the competent instructor. The adult learner comes to the instructional setting with a desire to share their experiences, have their contributions recognized and, most importantly, succeed. Instructors must continually provide opportunities for learners to participate and succeed to maintain motivation.

Set clear goals and objectives for the learner during the instructional setting. Reinforce the goals and objective with instructional material as well as through questioning the learner.

Effective presentation skills will captivate the learner and facilitate the learning process. Instructors in face-to-face settings will use eye contact with participants, change voice volume and inflection and pausing silently to emphasize important points. The instructor may use movement, posture, gestures and props to reinforce the learning process. This competency is discussed in depth in Module 4 of this course.

The competent instructor is a facilitator. In the purest sense, facilitation means to make something easy as the Latin word for easy is “facilis.” Hence, a facilitator is person who makes a process easier. An effective facilitator must be able to identify when facilitation is necessary and adapt learning styles to meets the needs of participants in the learning process. The facilitator must possess strong assessment skills demonstrated by observing, listening and questioning. Observing skills are used to identify if there is material is comprehended. By observing facial expressions and posture of the learner, an astute instructor will understand if learning is occurring. The instructor may listen for feedback or question participants directly to check for understanding.
To facilitate the process of learning, the instructor will set clear instruction for the learning activity removing as much ambiguity as possible. The effective facilitator brings learning sessions and activities to a definite close often with review and questioning so that learning is assured.

The effective facilitator draws upon the experiences of the participants to add depth and breadth to a discussion. This not only assists with reaching participants with diverse backgrounds it also engages the participant in the learning process.

The instructor who asks appropriate questions will engage the participant in the learning process. Questioning may serve a variety of purposes in a learning setting. Clearly, questioning can be utilized to assess knowledge of and attitude towards the material to be learned. Questioning may serve other purposes equally important to the learning process. Questioning may serve as an icebreaker, may deflect antagonism, may serve as bridging between two or more topics or may serve to facilitate team development.

There are many types of questioning and the competent instructor will understand how and when to use the various types of questioning. An open-ended question may serve to create a deep conversation about a subject, whereas a closed question such as a yes or no response or a thumbs up or down gesture may be a good method of checking for understanding. Redirecting and rephrasing questions is a technique used when respondents may need more time to get the full understanding of the material. Instructors must tailor questioning to fit the aptitude of the participants.

To improve the learning process, a skilled instructor may use clarification and feedback. Clarification can reduce misunderstandings and eliminate misconceptions with the material to be learned. Clarification strategies include paraphrasing, providing analogies and extending a concept by with a new example. The instructor must be adept at looking for clues in the learner that clarification is necessary. Provide clarification when it is needed. Overstating concepts through clarification when none are needed may lead to inattentive learners.

“Feedback is the breakfast of champions.” – Ken Blanchard

Although this saying attributed to Blanchard is usually used in the context of performance review it has application to the learner and the competent instructor. Feedback provides the instructor the opportunity to strategically guide the learner to correct errors in thought and judgement as well as reinforcing appropriate performance. Feedback must be provided in a clear and concise manner so that it is understandable to the learner. It should be targeted and not used in a generic sense where the learner is not sure the feedback was to be directed at them. Just as difficult as it may be to provide feedback, it is difficult to receive. A competent instructor makes feedback task-related and not seen as a personal attack. Just as with questioning, there may be many methods to provide feedback. Feedback may take on an open-ended approach whereas the learner needs to link various concept or it may be as simple as the gesture of a nod indicating an acceptable response. Tailor the feedback to the learner and don’t provide it when it is not necessary or is not willing to be accepted.

Skills and knowledge to be learned are inconsequential if they are not retained and used in life or on the job. A competent instructor understands this and employs a variety of methods to create relationships between the learner and the concept or understanding. Students must be encouraged to generate retention by questions associated with the concept as well as others such as diagrams and concept
maps. Recall the work of Bloom and mastery learning. The highest levels of the learning ladder are evaluating and creating. The instructor must compel the learner to evaluate concepts from a consideration of each of the component parts of the concept and create something different from the concept. The ability to summarize, create graphical representations, present main ideas, interpret results, draw inferences and make predictions associated with a concept begins to demonstrate that learning mastery is being achieved.

A competent instructor must not only promote retention of knowledge and skills, they must promote the transfer of knowledge and skills to practical settings such as the workplace. The learner must be provided opportunities to create a plan to implement the knowledge and skills learned. They must also be encouraged to look at the transfer in a systematic way that identifies encumbrances and means to overcome them.

The competent instructor will identify and utilize the appropriate technology based on the learning to be accomplished, the characteristics of the learners and the setting at which learning is taking place. Technology utilization must meet the needs of the learners. That is, technology is to benefit the learning experience and not to make presentations more ostentatious or minimize the contact time the instructor has with the learners when it is not appropriate. The instructor may use video, audio, animations, computing and communication mediums to the fully extent practicable to enhance learning but they must not ignore the power of text and white space to add to the content and context of the message.

The competent instructor not only uses technology in the learning process, they must also prepare learners to use technology. The instructor must be constantly scanning the environment for innovative ways to use technology to enhance the learning process and share their work with colleagues and learners.
Measuring Effectiveness

How do you measure “stable and persisting change in knowledge, skills and attitude”?

- Instructor Assessment
- Assessment of Instructional Effectiveness
- Course Evaluation

Instructional Note

This slide should prompt the instructor to ask participants if they recall the definition of learning – a stable and persisting change in knowledge, skills and attitude. Mention the three components that are used to measure the effectiveness of instruction are the instructor assessment, assessment of instructional effectiveness and the course evaluation. Instructor assessment and course evaluation will be discussed at the end of this Module. Any further discussion at this point should focus on assessment of instructional effectiveness. This assessment is focused on what can be changes during instruction to enhance the learner-centered environment.

If learning is a “stable and persisting change in knowledge, skills and abilities”, how do we measure change? There are three important components associated with measuring effectiveness: instructor assessment; instructional effectiveness and course evaluation. Instructor assessment and course evaluation are covered at the end of this module and will not be covered here.
Assessment of instructional effectiveness is a formative assessment. This evaluation is focused on the process and requires the instructor to constantly monitor and make corrections to the delivery as necessary to refine goals and evolve strategies to meet the overall objectives of the course. Outcome of formative evaluation may be to modify exercises to better fit participants learning style, use locally-derived information as examples to reinforce course concepts.

The assessment of instructional effectiveness process must be clearly communicated to the learner in advance of learning. If learners are to be able to perform a skill at the end of a learning session, then the assessment should include the demonstration that the skill can be performed and this must be communicated in advance.

The skilled instructor understands that assessment of instructional effectiveness may be directed at the individual learner, a team of learners or both. In team settings, it is important for the instructor to establish certain criteria for assessment of individuals such that the outcome of the team function is also assessed. Throughout the learning process there must be time afforded to the learner to make self-assessments toward their progress meeting the prescribed goal or objective.

The competent instructor is always evaluating their effectiveness in the delivery of learning. Evaluation must take place throughout the learning process and by the use of the formal evaluation tool at the end of a learning session. Four areas must be continually assessed. The assessment areas are: the instructional material; the instruction methods; the instructor performance and the instructional setting. Not surprisingly, the assessment instructional effectiveness throughout instruction may be more effective than waiting for responses on a course evaluation.

When considering instructional material, is it accurate and up-to-date? If technology is being used in the learning process, is it functioning as expected? Are the instructional methods appropriate for the intended audience? Are methods and activities used in the learning process aligned with the goals and objectives? The performance of the instructor generally takes on a more formal approach using the course evaluation but that’s not to say that a competent instructor should undertake “midcourse” correction by their own assessment of the learners. Are learners engaging in questioning? Is motivation of the learners waning? Are activities supporting the learning process? Making assessments and changing to meet the needs of the learner are characteristics of a competent instructor. Instructional effectiveness can be enriched by the environment in which learning is to occur. Comfort in an instructional setting is important to the adult learner. Has the instructor considered the comfort of the learner when setting the room? The competent instructor will always attempt to be in the learning setting well in advance of the participants to set the room for optimal effectiveness.
The 31 *PRO-NET* Competencies are organized into six categories. The categories and a brief description are provided below. The entire set of competencies, associated indicators and performance standards are available at: [https://files.eric.ed.gov/fulltext/ED454382.pdf](https://files.eric.ed.gov/fulltext/ED454382.pdf). These instructor competencies were developed by Sherman, Tibbets, Woodruff and Weilder (Pelavin Research Institute) as a project of Building Professional Development Partnerships for Adult Educators (*PRO-NET*) and a publication of the U.S. Department of Education, Division of Adult Education and Literacy. The entire document may be found at [https://eric.ed.gov/?id=ED454382](https://eric.ed.gov/?id=ED454382).

The *PRO-NET* Competencies are organized into three broad themes that promote quality instruction in all instructional settings. The three themes are:
• **Keeping current in content area and in instructional strategies.** Instructors need to engage in a variety of ongoing professional development activities to keep abreast of new developments in curriculum content and related areas as well as instructional approaches.

• **Communicating and collaborating with colleagues and learners to facilitate learning.** The educational process involves a range of collaborative activities both within the organization and the community. Instructors require a variety of communication methods as they collaborate with diverse audiences and develop skills in problem solving, negotiation, and decision making.

**Working positively and nonjudgmentally with diverse populations.** Instructors must be persistent in incorporating instructional materials and strategies that are inclusive and free of bias.

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**Maintains Knowledge and Pursues Professional Development**

Instructors are the primary facilitators of student learning and must have the requisite skills and content knowledge to guide the instructional process. The competencies in this category emphasize construction of a knowledge based on adult learning principles, including such areas as learner motivation, cognition, and socio-cultural context as well as developing and maintaining the appropriate subject matter expertise of content matter and instruction. The competencies focus on the acquisition of knowledge through a variety of professional development activities (e.g., coursework, workshops, practitioner research, and journal reading), both individually and in collaboration with colleagues.

**Organizes and Delivers Instruction**

Organizing and delivering instruction is at the heart of the adult learning process. Competencies in this category include the development of instructional plans, sequencing and pacing of classroom activities, and linking instruction to learner needs and abilities. The competencies specified here encompass the delivery of a well-paced, appropriately planned lesson that also provides sufficient time for achieving learning objectives. Instructors should be able to demonstrate their knowledge of adult learning theory, learner cultures, and interpersonal dynamics to create an environment conducive to learning.

**Manages Instructional Resources**

Providing quality instruction requires an emphasis on managing instructional resources, managing time and management of the learner’s time-on-task. Priority is placed on time management, preparing and adhering to course schedules, and making effective use of relevant technology. Additionally, the competencies for this category focus on incorporating community resources into instruction to create a sense of attachment to the instruction as well as the selection of materials appropriate to learner needs and program objectives.

**Continually Assesses and Monitors Learning**

Assessing learner needs, monitoring progress, and providing feedback are essential components of the instructional process. There are many methods for monitoring the progress of learners including direct questioning, written assessments, and performance-based assessments. Learning also can be monitored in an individual or group setting. The competencies in this section focus on collecting and sharing information about learner needs and progress, and using the information to plan for or modify instruction to optimize learning.
Manages Program Responsibilities and Enhances Program Organization

Instructors conduct their work within a larger program context with missions and obligations. As such, the ability to collaborate and communicate effectively with administrators and instructional colleagues, and community members is important. The competencies in this section focus on collecting, managing, and sharing data and ideas to improve instruction and program quality.

Provides Learner Guidance and Referral

The role of instructors in adult education often goes beyond the formal instructional setting. Instructors often are called upon to serve the additional role of providing counseling and guidance to their students. Relevant competencies in this area include the knowledge of appropriate referral services and the ability to communicate learner needs to other service providers within the program.

The instructor that desires to continuously improve their instruction skills are encouraged to adopt a tool and use it for self-assessment.

Instructor Assessment and Course Evaluation

How do you know when you are improving performance?

Instructor Assessment  Course Evaluation
This question should be the preeminent thought on every instructor’s mind. It has meaning from the participant’s perspective as well as from the perspective of the instructor. A course evaluation focuses on reflections of the participants as they relate to the learning process. The effective instructor establishes a learning environment that is safe, comfortable and motivating to the learner-participant. The course evaluation is a method to measure the effectiveness of instruction. Course evaluations should include a mix of “ranking” question and written feedback taking care to understand that there is a diminishing point of return with course evaluation. Long, drawn out course evaluations may result in less actionable information as compared to relatively short evaluations that focus on only the most relevant information as matched to the overall objectives of the course.

A very important component of any course evaluation is an assessment of the instructor’s ability to perform in their role of fostering the learning process. In the context of the course evaluation, there is little opportunity to assess the instructor on an entire set of competencies. Competency of instruction should be measured in a peer-to-peer setting and not be relegated to the participant.

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**Instructional Note**

Slide 6-11 is animated. It will first appear with the question and a mouse click will reveal “instructor assessment” and another click will reveal course evaluation. Mention both are important to understand if instruction is effective. The next slide introduces instructor assessment.
Instructor Assessment

- Should not be left up to chance
- Measure Performance against a set of standards

<table>
<thead>
<tr>
<th>Beginning</th>
<th>Acceptable</th>
<th>Accomplished</th>
<th>Mastered</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description reflecting beginning level of performance.</td>
<td>Description reflecting movement toward mastery level of performance.</td>
<td>Description reflecting an understanding what constitutes a mastery level of performance without consistent demonstration.</td>
<td>Consistently demonstrates knowledge, skill and attitude beyond the expected level of performance.</td>
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<table>
<thead>
<tr>
<th>poor</th>
<th>fair</th>
<th>good</th>
<th>very good</th>
<th>excellent</th>
</tr>
</thead>
<tbody>
<tr>
<td>seems personally disinterested; does not inspire learning</td>
<td>generally interested and enthusiastic; not especially interesting</td>
<td></td>
<td>shows sustained interest and enthusiasm for the course; knowledgeable of subject matter</td>
<td></td>
</tr>
</tbody>
</table>

Comments:

The primary goal of instruction is to improve the performance of participants – a steady and persistent change in knowledge, skills and attitude. It is incumbent upon the instructor to follow the same path to improve performance. Instructor assessment is a means to measure performance against a set of standards. Standards, as the name denotes, is considered a basis of comparison to an established set of normative statements or values. The performance of the instructor, therefore, should not be left to chance or some open-ended question such as “what did you think about the instruction?”. Instructor assessment must be guided by competencies.

Measure of instructor assessment may follow some hierarchal ladder similar to the Bloom’s hierarchal ladder. The measure should be simple and easily defined so that it is clear to the assessor and to the assess the meaning of the ranking. The following is a measurement scale that may be useful for instructor assessment.

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Another effective method of measurement is the poor-fair-good-very good-excellent scale. To be effective it should include definitional aspects to the scale so that it is clear how each measure should be applied. The following is an example of how this scale is applied:
Instructor’s knowledge for teaching the course:

<table>
<thead>
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Comments:

Course Evaluation

- Should be predictive of the value of the training
- Should shape changes to instruction
- Examples of these Summative Assessments:
  - Questionnaires
  - Surveys
  - Testing
- Are the participants applying what they learned?

As with instructor assessment, the course evaluation must be considered the backbone of continuous quality improvement. Without an evaluation method, is there any way to understand if the training was of any value or if it met the training objectives? Evaluation is usually considered an end-of-course tool and should be coupled with the assessment of instructional effectiveness, an ongoing process throughout the course delivery process. The end-of-course evaluation is considered summative whereas the ongoing process is considered formative. The formative evaluation is a method of judging the effectiveness of the instruction while instruction is ongoing. The summative evaluation is given at the end the course and is a method to judge the worth of the program. Questionnaires, surveys and participant testing are examples of summative evaluation. Summative evaluation is useful to
instructional designers to modify and improve course delivery material and methods. Both evaluations are very important to the short-term and long-term success of instruction.

To be effective, the course should be evaluated by the following categories. The evaluation areas are: the learner; the instructional material; the instruction methods; the instructor performance and the instructional setting.

Effective evaluation must start with the learner. If learning occurred, there would be an observable change in knowledge, skills and attitude. This may be measured by testing for knowledge gained such as with pre and post testing, observation of skills the learners are able to perform after instruction, or the application of the instruction in the workplace. Attitudinal changes are oftentimes best observed in the workplace and answer the question “Are the participants applying what they learned?”.

Instructional material must be assessed for the flow and structure of the material. Does the way the material is presented complement the learning objectives? Is there a balance between lecture and activities? Do the activities reinforce concepts presented?

Is there a balance of delivery methods to support the visual, auditory and kinesthetic sensory learning styles? Do the instructional methods meet with the work culture of the participants? You will not use the same instructional methods on college professors as you would for an auto body repair person.

Instructor evaluation is an important component of course assessment. It is improbable that evaluation of a course delivery would not include an evaluation of the course deliverer. This evaluation will differ from the instructor assessment as it will be abbreviated and focus on mirroring other components of the course evaluation. Instead of moving deep into each instructor competency, this evaluation may focus more of each of the domains and ask for evaluation of the instructor’s professional foundation; how well they were prepared, if the instructors’ methods and strategies fostered the learning process and if the instructor managed the course delivery to facilitate the learning process.

A sample course evaluation is provided as an Appendix.
Summary

- Recognize the competencies associated with the effective instructor
- Associate assessment and evaluation as a means to continuous quality improvement

Coming Up Next

Teachback
Instructional Training for the Public Health Professional

Teachback Exercise

Instructional Training for the Public Health Professional
TEACHBACK EXERCISE

Module Objectives

Module Objectives
By the end of this module, participants will produce instruction based on the material learned from this course.

- Apply instructional strategies to support effective instruction
- Apply instruction and delivery skills to the presentation
- Understand the assessment as a continuous quality improvement process
Performance Objective
By the end of this module, participants will produce instruction based on the material learned from this course.

Learning Objectives
By the end of this module, the instructor shall accomplish the following learning objectives in support of the performance objective:

- Apply instructional strategies to support effective instruction
- Apply instruction and delivery skills to the presentation
- Understand the assessment as a continuous quality improvement process

This module will provide an opportunity to participants to deliver content from the Foodborne Outbreak Response Team Training course. At the end of Module 4, participants were provided a printed version of three to four slides. Presentation slides provided are either discipline-specific or are more generic slides that discuss foodborne outbreak response.

Instructional Note
Prior to the course delivery, the lead instructor will coordinate this activity with the POC. The lead instructor shall get the number of participants that will be attending and prepare the appropriate amount of slides. Slides should be copied and pasted into the file with a “leader” slide (see below). The lead instructor will have a printed version of the slides to be presented and these shall be handed out at the end of Module 4. Providing the slides and content from the instructor manual the night prior to the training or immediately the day of the training will give participants time to understand the content.

The lead instructor shall prepare assessment forms for each of the participants and provide them to the instructors. Each participant will be assessed by at least two of the three instructors depending on time allotted to this exercise. If ample time exists, all instructors should evaluate but the evaluation should be provided by one instructor in a one-on-one setting.
The Presentation

• Participants will start on the “leader” slide.
• Presentation shall take at least three (3) minutes and no more than five (5) minutes
• Participants will be assessed and a review will occur after the presentation.

Presentation 1

MODULE 2, SLIDES 5 THROUGH 8

NOTE: These slides were copied from a previous Epi-Ready course and modified to fit the “Retrospect” slide design. No content has been modified.
Complaint Systems

- Complaints of illness among individuals and groups reported by affected members of the community (and others)
- Includes any illness thought to be related to food
- Common exposures used to link cases together

Steps in Receiving Complaints

1. Illness in individual or group
2. Complaint to local health department
3. Interview of complainant
4. Documentation of information
5. Evaluation of individual reports for immediate action
6. Key information entered into log
7. Routine review of log
8. Evaluation of reports over time for outbreaks

- Starts with complaint by consumer
- Common exposures link cases over time
Interview of Complainant

- Who is affected? (name, age, and sex)
- What is the problem? (symptoms, diagnosis)
- When did problem occur? (date/time of onset)
- Where? (place of residence and exposure)
- Why/how? (travel, water, contact with ill persons or animals, suspect food or meal, food history)

Collecting Food Histories

Complete food history including:
- Foods eaten in 5 days before onset of illness
  - If norovirus likely, focus on 24-48 hours before illness.
  - If >1 ill person, focus on shared foods/meals.
- ALL foods eaten during time period of interest (unless focusing on shared foods/meals)
- Details of named events, food establishments, or suspect food products
- Information on non-food exposures
This assessment process should take approximately 2.5 hours to complete with 24 participants. Instructors and participants must be cognizant of time constraints and move through presentations and assessments quickly.