Stop presenting and start facilitating meaningful learning.

Whether you are a subject matter expert who occasionally takes on a trainer role, a trainer who wants to further develop your presentation skills, or anywhere in between, Facilitation Basics will help you create supportive and effective learning. This in-depth resource is designed to improve your facilitation proficiency so you can deliver your best training to face-to-face, online, and virtual classroom learners.

Part of ATD's Training Basics series, Facilitation Basics offers practical examples, worksheets, and tools. You’ll walk away with proven facilitation techniques, a new way to think about difficult participants, and helpful tips for using media to support learning. Facilitation is about guiding the learning process and making the journey smooth and rewarding for learners—this newly revised edition will help you meet those goals.

Praise for This Book

"Facilitation Basics is an outstanding, must-have resource covering all elements of the facilitation process. Don McCain has written a comprehensive, easy-to-follow primer for both seasoned as well as novice facilitators of learning."

—William J. Vosburg
President and Founder, Vosburg & Associates

"Whether you are an experienced facilitator or just beginning, Facilitation Basics is an excellent resource to learn new skills or to sharpen your facilitation skills."

—Glenda McCall Blank
Head, Global Organizational Development & Learning, CFA Institute

"Facilitation Basics enhances facilitation skills in synchronous, asynchronous, and blended settings. The author provides quick, usable approaches enriching any learning environment."

—Carol-Anne Faint
Professor, Business Administration, University of Fredericton
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About the Training Basics Series

ATD’s Training Basics series recognizes and, in some ways, celebrates the fast-paced, ever-changing reality of organizations today. Jobs, roles, and expectations change quickly. One day you might be a network administrator or a process line manager, and the next day you might be asked to train 50 employees in basic computer skills or to instruct line workers in quality processes.

Where do you turn for help? The ATD Training Basics series is designed to be your one-stop solution. The series takes a minimalist approach to your learning curve dilemma and presents only the information you need to be successful. Each book in the series guides you through key aspects of training: giving presentations, making the transition to the role of trainer, designing and delivering training, and evaluating training. The books in the series also include some advanced skills, such as performance and basic business proficiencies.

The ATD Training Basics series is the perfect tool for training and performance professionals looking for easy-to-understand materials that will prepare nontrainers to take on a training role. In addition, this series is the consummate reference tool for any trainer’s bookshelf and a quick way to hone your existing skills.
So, you are now the teacher, instructor, or trainer: the person who will be leading a class of adult learners. In other words, you’re now a facilitator of learning experiences. Where do you go from here? You may not know it, but you’ve already embarked on the journey to becoming a great facilitator! The mere fact that you’re reading this book means that you have already discovered that facilitating learning is not the same thing as presenting information (but more on that as we go along).

That’s key to your success.

What Is a Facilitator?
The expression, “Those who can, do; and those who can’t, teach,” could not be further off the mark. The fact is that those who teach, or facilitate learning, and do it well, know their subjects (both content and application of that content to the job) better than anyone else.

Subject matter expertise is the foundation for facilitating an effective learning experience. Furthermore, facilitation proficiency—the focus of this book—is a skill set that supports your ability to facilitate others’ learning and application of the subject matter.

The word *facilitate* comes from the Latin word *facilis*, which means “to make easy.” As facilitators, that is our job: to guide the learning process and make the journey as smooth and as rewarding as possible for our learners—to make the learning easy.
Who Should Read This Book?

This book is for people who want to enhance their skills in facilitating others’ learning experiences in an organizational environment. This may include face-to-face, online, or virtual classroom learning. Such a group might include:

- subject matter experts who occasionally function in a training role or are moving into a training role in their jobs
- trainers who are ready to move beyond presenting information or using learning activities for their entertainment value only
- faculty members in educational institutions who want to add skills and application to their classroom experiences
- HR professionals or managers who contract with facilitators and want to evaluate their performance
- trainers who want to enhance their facilitation skills
- trainers who want to enhance their online or virtual classroom facilitation skills
- trainers whose organizations are holding the training function accountable for learners’ performance back on the job.

The purpose of this book is to facilitate your learning and assist in enhancing your facilitation skills. When you continue your learning journey by enhancing your own skills, you will increase the learning that takes place in your courses, the probability of skill transfer back to your learners’ jobs, and the impact of training on your organization.

Chapter-by-Chapter Highlights

Your success as a facilitator of learning depends on your ability to immerse yourself in the learning experience by sharing it with the learners and guiding them at the same time. Your success also depends on creating an environment that is safe for the learners on multiple levels (interpersonal, physical, psychological, and emotional).

Each chapter focuses on a critical aspect of creating and maintaining an optimal learning environment. These ideas are also applied to an online or virtual learning environment. Here’s a summary of the 10 chapters in *Facilitation Basics*:

1. “Introduction: It’s Not About You—It’s About Them!” gives an overview of the book. It establishes the premise that effective facilitation is about the learners, not about the facilitator. This chapter also discusses some types of online training and some myths
and realities regarding those methods. Finally, some considerations are discussed that will help you appraise the course design in preparation for facilitation.

2. “Learning Facilitation” presents the principles that underlie effective learning facilitation and explains why effective learning is about the learners. The chapter covers the differences between presenting and facilitating, how adults learn, and the implications for facilitation of learning.

3. “Learner and Facilitator” focuses on learner preferences and learning styles, what it takes to be a facilitator, roles that learning facilitators take on, and criteria for selecting effective facilitators.

4. “Getting Started” builds on a premise of this book: that it is critical to focus on what happens in the learning environment as the learning unfolds. To start a learning session off on the right foot means the facilitator must know the audience, create a climate for learning, establish a physical presence, and personalize learning materials.

5. “Facilitating Learning Activities” discusses the types of learning activities used by facilitators, the goals of these learning activities, and the planning that must be done beforehand, whether the program is face-to-face, online, or in the virtual classroom.

6. “Facilitation Techniques” addresses the events that occur as the learning experience unfolds, as well as with how to facilitate those events. It discusses the sequencing of activities, giving activity instructions, managing time, managing group size, grouping participants, monitoring activities, providing feedback, managing assessments and measurements, and adjusting facilitation on the fly, regardless of the learning environment.

7. “Managing Difficult Participants” offers techniques for working with difficult participants, starting with the idea that defining them as “difficult” may be part of the problem! Considerable time is spent looking at ways that facilitators can set aside personal agendas and focus on the professional agenda, which is to make learning happen. To support this, tactics to handle disruptive behavior in the on-site and virtual classrooms, both prior to and during the learning experience, are identified and described.

8. “Using Media to Support Learning” introduces the world of media available to you as a facilitator. Believe it or not, there really is a whole world beyond Microsoft
This chapter discusses using media to specifically support the identified learning needs (and there are appropriate situations for PowerPoint). Tips for effectively using each type of media are presented as well.

9. “Assessing Facilitation Quality” covers ways facilitators can get feedback on their performance and ways that facilitator quality (either your own or a facilitator you manage) can be assessed using materials that are built into your courses, such as tests, assessments, and smile sheets.

10. “A Final Note” can help you pull everything together. In this chapter, food for thought is presented on the facilitator's role in the organization.

The book also includes references and additional resources, which provide many sources to support your professional growth as a facilitator.

Each chapter opens with a quick access guide—What’s Inside This Chapter—to introduce you to the contents of the chapter. Use this section to identify the information it contains and, if you wish, skip ahead to the material most useful to you.

The final section of each chapter—Getting It Done—offers you a chance to practice some of the concepts discussed in the chapter and provides closing tips and pointers to help you apply what you have learned.

This book strives to make it as easy as possible for you to understand and apply its lessons. Icons throughout the book help you identify key points that can mean the difference between a facilitation success or an embarrassment.

**Basic Rules**
These rules cut to the chase. They are unequivocal and important concepts for facilitators.

**Noted**
This icon is used to give you more detail or explanation about a concept or a principle. It is also occasionally used for a short but productive tangent.

**Think About This**
These are helpful tips to help you prepare for facilitation or during facilitation.
It’s Not About You—It’s About Them!

What’s Inside This Chapter

• How to use this book to support and enhance your skills as a learning facilitator
• Three types of online training
• Myths and realities of online training
• Three characteristics that indicate your readiness to take on the facilitation skill set
• Ways to appraise a learning design before you plan your facilitation, including online training
• What to do if the learning design has some problems
How *Facilitation Basics* Can Help You

Facilitating a learning experience can be extremely rewarding, but it is also a challenge. The reward for facilitators comes from the learners: their success when they learn content, use and apply it, grow, and, ultimately, perform better back on the job. It’s a great feeling to watch people’s faces light up when they master a new concept!

The challenge for facilitators comes from the same source as the reward: the learners. Facilitating learning experiences is about the learners, so the focus must be on them at all times. For facilitators with a background in presentations or content expertise, this is a new paradigm. Many presenters and trainers are used to focusing on themselves and their ability to answer questions, control the group, and demonstrate expertise.

Some Assumptions

*Facilitation Basics* necessarily begins with some assumptions about the characteristics and skills you already possess. Your work with this book will be based on these assumptions:

- **Assumption 1:** You already possess basic platform skills. You are comfortable in front of a group, and you have mastered the principles of basic presentation techniques, including stance, voice, gestures, eye contact, and basic media skills. This book will help you review and build on those skills.

- **Assumption 2:** You are an expert in the subject matter you are facilitating. This means you have thorough knowledge and experience in the subject area and can share examples and stories with your learners to enhance your facilitation.

- **Assumption 3:** You have a well-designed course to facilitate. Learning design and facilitation go hand-in-hand in making an effective learning experience. Although this book focuses on the facilitation aspect, you must first appraise the training design that you have been given. This is equally true of online (synchronous, asynchronous, or blended) and virtual classroom courses.

If, after reading these three assumptions, you think you need to brush up on your basic presentation skills, you may wish to do some additional practice until you feel comfortable. Some of the publications in the Additional Resources section can also help you hone your presentation skills.
If you need to increase your subject matter expertise, try getting more experience and practice, or shadow an expert. Another alternative is to partner with a subject matter expert who can co-facilitate a learning experience with you.

If the course you are facilitating has an incomplete design or some design problems, you may need to do some prework to enhance the design before facilitating the course. Design considerations are addressed in some detail in the next section.

**Think About This**

These three design components must be investigated, appraised, and perhaps enhanced before a course is facilitated:

- learner profile information: available, detailed, and accurate
- learning objectives: aligned with learning activities, measurements, and assessments
- content segmentation and flow: content is clear, and flow and segmentation support effective learning.

**Types of Online Training**

Online training and the virtual classroom provide an excellent alternative to face-to-face training. These are some of the benefits:

- Deliver training in a cost-effective method, while reducing travel and materials costs.
- Allow a dispersed audience to effectively interact with other learners and the facilitator.
- Access a global audience within a single virtual classroom training course.
- Involve experts from within or outside the organization through virtual discussion, without having to be physically present.
- Reach participants who may not be able to attend a face-to-face training session.

There are many discussions and perspectives about what constitutes online training, but every definition includes a computer interface with some providers and a virtual classroom with a groupware option. For the purposes of this book, there are three basic types of online training: self-paced asynchronous training, blended learning, and virtual training.
Self-Paced Asynchronous Training

In its truest form, each learner in a self-paced asynchronous training program interacts only with the computer, moving through the content according to his own pace. There are usually sequential modules with timelines, and in some cases the work may not be accepted if too much time lapses. This is much like an electronic correspondence course. Following submission of an assignment, the facilitator should provide feedback within a couple of days. It is critical that the learner receives complete and timely feedback.

However, asynchronous online learning does not have to be this way. The training program can also include media, such as PowerPoint, videos, and charts, as well as threaded discussions, discussion boards, chats with other participants, and virtual team work. In some ways, this format becomes much more like a webinar because it is not restricted to an individual, her computer, and the facilitator. However, these more interactive sessions also require the participant to give up some freedom because there is more structure and usually a schedule.

This type of training also allows for on-the-job application of ideas. You can give participants assignments (along with detailed instructions) and, if you wish, require management sign-off on the finished product.

Blended Learning

In this case, prework is sent to the learner to study and complete the exercises before the start of the training program. The learner then meets for one or more face-to-face sessions with other learners and the facilitator. Online follow-up can also be used to reinforce the learning or application on the job. This type of approach is common for cases where learners may not be at the same knowledge and skill level prior to the classroom learning. Pre-tests or post-tests can easily be provided in an online format.

Blended learning may involve online learning, the virtual classroom, or both, so it is not discussed as a separate learning environment.

Think About This

In both the self-paced and blended formats, learners can be engaged in threaded discussions or discussion boards. Here, the facilitator posts a question or scenario and requests that learners respond. To enhance engagement and learning transfer, have the learners respond to others’ comments, in addition to the initial post.
Virtual Training

Virtual training is synchronous learning because the learners and facilitator are participating at the same time. Cindy Huggett defines virtual training as “a highly interactive synchronous online instructor-led training class, with defined learning objectives, with participants who are individually connected from geographically dispersed locations, using a web-based classroom platform” (2013, 11).

Technology bridges the location issue, with all learners logging in to a common site and engaging in the session. (Several software collaboration programs are available to support the virtual training environment.) In these synchronous sessions the facilitator can use a whiteboard for charting and include PowerPoints, videos, and polling. Webcams can provide visuals of the learners, although this may inhibit interaction. The facilitator can present content and ask questions, while learners have the ability to work in groups and make presentations, among other things. The facilitator can also structure virtual teams, building the diversity of the teams based on background, and provide 24/7 virtual breakout rooms.

**Think About This**

The virtual classroom offers most of the benefits of the face-to-face classroom. In some cases, virtual classrooms even allow for more interaction because there is less intimidation and no travel costs. In both the blended and virtual training program, the facilitator can form teams and have breakout rooms and team presentations.

Using a virtual classroom is more robust than videotaping a presentation and sending it out. While some organizations have the capability to provide real-time video with satellite, the virtual classroom allows the learner to have quick and flexible interactions with the facilitator or other learners. The session can be recorded for others to view later.

**Think About This**

Because virtual classroom sessions can be recorded, you can make them available to other learners by simply posting them on an online platform. The learners can then log in to the recorded session to listen to the discussions and view the media.
The selection of delivery type is a design and development issue; learners’ needs, among other factors, must be considered. Facilitators can use the same skills for blended and virtual training as they do in face-to-face training.

Myths and Realities of Online Training

Even after many years of online training in business, industry, and academia, there remain many myths concerning this method of delivery.

**Online training is impersonal.** Online training can be made personal. The leader can post his profile, engage in discussions with the participants, and be available through video, chat, or email. Try using the coffee shop method by creating an informal virtual gathering place to share noncourse-related areas of interest.

**There is no interaction with the facilitator or other participants.** The myth that online training is limited to the learner and her interaction with the computer does not make the distinction between e-learning and online learning. The design of an online course can include team projects and meetings using virtual breakout rooms, individual documents can be shared with team members, and threaded discussions allow for easy sharing of ideas. The facilitator can also engage in any of these participant interactions. Remember, as with any training, the quality of the interaction is dependent on the background and preparation of the participants and facilitator. There can be significant and robust participant interaction.

**Learners don’t participate.** In reality, there may be more participation because the fear of speaking in front of others is removed. The virtual classroom creates a safe environment where social and cultural barriers are diminished and it is easier to share ideas and experiences. Because participants lose their inhibitions, they become more freely engaged in virtual discussions and are held accountable for their interactions.

**Online training does not provide the opportunity for team projects.** Working in groups in a virtual environment is more challenging. However, teams can have virtual breakout rooms that are available 24/7. In addition, virtual meetings allow team members to be better prepared and more focused because they help alleviate schedule and time-zone issues. Completed projects can be presented to all participants using team presentations.
The course facilitator will not be accessible. Many facilitators set up several office hour blocks each day. This is time dedicated to the course participants. Facilitators also engage in the threaded discussions and discussion boards, and provide timely feedback on any submitted work. Participants can also contact them using email, video chat, and other methods.

Online training takes less participant time. Generally, online training will take as much or maybe more time than classroom training. Depending on the type of online learning, the participant may have to do more individual assimilation of the material and engage with other participants. However, there is no commuting, which saves time. An added benefit is the flexibility of scheduling much of the online work.

Online training does not provide for learning evaluation. Level 1 and 2 evaluations can easily be incorporated into online training. The usual Level 1 through end-of-course survey can be used and quickly tabulated. Level 2 evaluations can use online knowledge tests, projects, and case studies. Application exercises that provide feedback for transfer can be built into the program. On-the-job use can be assessed through surveys and interviews or focus groups, which all use online technology. Based on the metric identified, facilitators should be able to analyze the impact and return on investment (ROI). So, if the evaluation plan is designed into the training program, much like the face-to-face classroom, online training can be evaluated.

Online training is fundamentally different. Traditional and online training have many of the same design elements (objectives, instructional strategies, team and individual work, macro-design), use media, and have a defined meeting place where participants engage the facilitator and other participants (virtual or face-to-face classroom).

All online training is the same. The differences between online training, webinars, e-learning, webcasts, and virtual classrooms speak to the amount of interaction between the facilitator and participants, and whether the intent is to share knowledge or improve performance.

Online training is less demanding or complete. Any online training has the same performance expectations and contains the same requirements and assignments as a face-to-face seminar or workshop.

Online training is too disorganized. Online courses should not be hard to follow. A well-designed online course has:

• goals and learning objectives
• a course map with easy navigation
• individual modules with distinct requirements and specific instructions, access, or embedded materials
• submission deadlines with easy methods to submit the work.

When designed properly, online courses can actually be more organized than some face-to-face seminars and workshops. There is no getting off point, time-management issues aren’t as common, and difficult participants aren’t as disruptive.

Anyone can take an online training course and be successful. Completing an online training course requires discipline, self-management, and self-direction, as well as the ability to function with more autonomy and a willingness to ask for help from other participants or the facilitator. Learners must be active, taking responsibility for their own learning.

It is easier to cheat. It is possible that the person completing the projects or taking the assessments may not be the individual enrolled in the course. This does pose a dilemma, but here are some possible solutions:

• Require a manager to sign off on a project.
• Use item analysis of objective tests to help uncover collaboration.
• Check for plagiarism using the available software.
• Ask participants to sign an honesty policy.

Before You Begin: Design Considerations
As a facilitator, you will be handicapped from the start if the original course design isn’t effective. Depending on the situation, enhancing the design before you start can be an effective option. You must review the needs assessment findings, check the learning objectives, and make sure that the learning activities and assessment methods align with the learning objectives.

Needs Assessment Findings
Your course designer, facilitator guide, course materials, and client should provide you with needs assessment information regarding the learners’ backgrounds, skill levels, learning styles, comfort with learning activities, work environments, and attitudes toward the learning experience. Knowing the audience profile will greatly enhance your facilitation and enable you to customize it to the learners’ characteristics and needs.
Learning Objectives
Learning objectives and outcomes should be specified and stated in observable, measurable terms. If you have specific and measurable learning objectives, you will always know where you are driving the learning and what the learners must be able to do when the course is complete and they are back on the job.

Segment course content to maximize learning effectiveness—not too much content at one time without practice and application. Any must-know content should be clearly identified in the participant materials and handouts, for your benefit as well as the learners’.

Activities and Assessments
Learning activities and assessment methods should align with the learning objectives they represent. The course design should ensure that your learners gain the required knowledge and increase the probability of their transferring the skills back to their jobs.

The design should also encompass a variety of learning activities and a varied pace. Make sure you vary the learning activity sequence too. You want your activities to appeal to all learning styles and knowledge and skill levels at some point during the learning experience.

Noted
Effective learning is the result of effective design and facilitation, and the line dividing the two areas of expertise is not a clear-cut delineation. Effective design supports effective facilitation, and there will be times when that dividing line is pushed a bit to discuss or acknowledge the design implications of a particular area of facilitation. This book is not intended to teach you how to design (or redesign) training, but that is the focus of the second edition of Training Design Basics (Carliner 2015).

Assessing the Online Course
Just as design is critical for face-to-face learning, it is also critical for online learning. As a facilitator, you will be faced with the challenge of managing and facilitating the online course. It is important to ensure the learning activities and assessment methods are aligned with the learning objectives, as well as check for learner interaction and application of concepts on the job. Other aspects of online learning—such as technical support, navigation, or access to content—are beyond the scope of the facilitator. That said, the facilitator should address these issues with the course designer and technical staff. Exercise 1-2 at the end of this chapter provides a guide for rating an online course.
Making Do With a Suboptimal or Incomplete Design

What if the course design and materials you have been given do not contain all the components of good learning design? Depending on the situation, you have a few options:

• Go back to the course designer and ask for a redesign to include those components.
• Work in tandem with the course designer to rework the design.
• Interview the course designer to obtain the necessary information and build it into the facilitation yourself.
• Go with what you have and hope for the best. (Note, however, that this is not the best course of action and typically leads to lower quality of results.)
• Although a good facilitator can make a poorly designed seminar or workshop fun, it takes both a well-thought-out design and excellent facilitation skills to produce a high-quality learning experience.

Ready, Set, Go!

So . . . if facilitating isn’t about the design of learning before the course begins, what is it about? It’s what happens during the learning experience itself. It’s about meeting the learners where they are, not where you are. It’s letting the learners have the first crack at the learning (self-discovery) so that it belongs to them, not you. It’s understanding that the learning experience is about learners mastering and applying knowledge and skills, not how much content you can cover in the time allotted.

Facilitation Basics, 2nd edition, is filled with examples, worksheets, checklists, and other tools to aid you in thinking through your own facilitation of learning and to help you make these principles and concepts your own.

Ready to get started?

Getting It Done

In this chapter, you learned about the three types of online training, as well as some myths and realities surrounding the subject. We also covered the three characteristics that you must have before you can effectively facilitate a learning event. The chapter also discussed how to appraise a learning design and what to do if it falls short. Exercise 1-1 will aid you in assessing your readiness and the readiness of the learning design that you have been given. Exercise 1-2 will help you rate the quality and completeness of an online course.
Exercise 1-1. Are You Ready?

In Section 1, indicate your readiness as a facilitator by checking the “Yes/No” column and adding details in the “Comments” column. For items that you would like to develop further, jot down your plans and ideas in the “Action Items” column. In Section 2, indicate the adequacy of the learning design by checking the “Yes/No” column, adding details in the “Comments” column, and itemizing your plans to improve the design (if any) in the “Action Items” column.

### Section 1: Facilitator Readiness

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<td>I am confident of my expertise in the subject matter of the course I am to facilitate:</td>
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Exercise 1-1. Are You Ready? (continued)

Section 2: Learning Design Appraisal

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<tr>
<td>and accurate:</td>
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<tr>
<td>• Backgrounds</td>
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<td></td>
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</tr>
<tr>
<td>• Skill levels</td>
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<td></td>
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</tr>
<tr>
<td>• Learning styles</td>
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<tr>
<td>• Comfort with learning activities</td>
<td></td>
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<tr>
<td>• Work environments</td>
<td></td>
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<tr>
<td>• Attitudes toward the learning experience</td>
<td></td>
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</tr>
<tr>
<td>Learning objectives are appropriate:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Specific</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>• Aligned with learning activities and measurements/assessments</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Stated in observable, measurable terms</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Content segmentation and flow are clear and support effective learning:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Segmented appropriately</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>• Must-know content is clearly identified</td>
<td></td>
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<tr>
<td>• Variety of types of learning activities</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Varied pace and learning activity sequence</td>
<td></td>
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</tr>
</tbody>
</table>
Exercise 1-2. Rating Guide for Online Courses

In this rating exercise, rate each of the dimensions related to the quality and completeness of an online course by using the 0–5 rating scale. Make comments regarding the rationale for the rating and ideas for improvement.

<table>
<thead>
<tr>
<th>Rating</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>High/Excellent—evidence for a factor or quality exists, and the material is of excellent or highly consistent quality. The training material or learning experience may be very effective due to the excellent or outstanding qualities of the course.</td>
</tr>
<tr>
<td>4</td>
<td>Better than level 3 but not at level 5.</td>
</tr>
<tr>
<td>3</td>
<td>Good/Consistent—evidence for a factor or quality exists, and the material is of good or consistent quality. The training material or learning experience may be effective due to the presence of this factor or quality in the course.</td>
</tr>
<tr>
<td>2</td>
<td>Better than level 1 but not at level 3.</td>
</tr>
<tr>
<td>1</td>
<td>Poor/Inconsistent—evidence for a factor or quality exists, but the quality is poor or inconsistent. The training material or learning experience may be less effective without this factor or quality being improved or consistently applied.</td>
</tr>
<tr>
<td>0</td>
<td>Missing/Absent—no evidence exists. The training material or learning experience is incomplete without this factor or quality being present.</td>
</tr>
</tbody>
</table>
### Exercise 1-2. Rating Guide for Online Courses (continued)

<table>
<thead>
<tr>
<th>The quality of this course is:</th>
<th>Comments</th>
</tr>
</thead>
</table>

#### General/Overview

1. There is an introduction section that outlines the purpose of the course and provides “how to use” instructions.
   - There is a “navigational tour” to describe the navigation buttons of the interface.
   - Score: 1 2 3 4 5

2. Text is easy to read.
   - Score: 1 2 3 4 5

3. There is just-in-time access to content.
   - Score: 1 2 3 4 5

4. Course allows learners to determine their own module(s) or learning path, based on demonstrated competency.
   - Score: 1 2 3 4 5

5. There is ease of navigation (how learners move through the course):
   - A course map is provided.
   - Colors, graphics, or symbols are used to help learners identify where they are in the course.
   - There are exit options that allow learners to return to specific places in the course.
   - There is a complete explanation of the user interface.
   - There is a trail of text at the top that displays participants’ current path through the course page.
   - Score: 1 2 3 4 5

6. There is easy, timely access to the course facilitator.
   - Score: 1 2 3 4 5
Exercise 1-2. Rating Guide for Online Courses (continued)

<table>
<thead>
<tr>
<th>The quality of this course is:</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1.</strong> The course has stated goal(s) indicating overall purpose.</td>
<td>0 1 2 3 4 5</td>
</tr>
<tr>
<td><strong>2.</strong> There are established learning objectives:</td>
<td>0 1 2 3 4 5</td>
</tr>
<tr>
<td>• They are measurable.</td>
<td>0 1 2 3 4 5</td>
</tr>
<tr>
<td>• They are written for level 2 (learning).</td>
<td>0 1 2 3 4 5</td>
</tr>
<tr>
<td>• They are written for level 3 (transfer/application).</td>
<td>0 1 2 3 4 5</td>
</tr>
<tr>
<td><strong>3.</strong> The course content links to and supports learning objectives.</td>
<td>0 1 2 3 4 5</td>
</tr>
<tr>
<td><strong>4.</strong> There is a consistent sequence or format for each module (e.g., introduction, content, practice, application, summary).</td>
<td>0 1 2 3 4 5</td>
</tr>
<tr>
<td><strong>5.</strong> There is consistency of style throughout the course (fonts, colors, use of graphics, photos, etc.).</td>
<td>0 1 2 3 4 5</td>
</tr>
<tr>
<td><strong>6.</strong> There is a logical learning path.</td>
<td>0 1 2 3 4 5</td>
</tr>
<tr>
<td><strong>7.</strong> There is a modular approach allowing for short blocks of study.</td>
<td>0 1 2 3 4 5</td>
</tr>
<tr>
<td><strong>8.</strong> There are motivational components to keep learners engaged (testing, game, novelty, humor, surprise).</td>
<td>0 1 2 3 4 5</td>
</tr>
<tr>
<td><strong>9.</strong> The course’s technical design promotes a smooth flow of learning:</td>
<td>0 1 2 3 4 5</td>
</tr>
<tr>
<td>• Screens only refresh “changed” information.</td>
<td>0 1 2 3 4 5</td>
</tr>
<tr>
<td>• There are no delays or excessive levels to navigate.</td>
<td>0 1 2 3 4 5</td>
</tr>
<tr>
<td>• All nontext information (graphics, audio, video, animation) is easy to view/hear and does not cause delays.</td>
<td>0 1 2 3 4 5</td>
</tr>
<tr>
<td><strong>10.</strong> There is a variety of media to present concepts.</td>
<td>0 1 2 3 4 5</td>
</tr>
<tr>
<td><strong>11.</strong> There is quality of text, graphics, and animation:</td>
<td>0 1 2 3 4 5</td>
</tr>
<tr>
<td>• The graphics support learning to illustrate concepts, shape interactive practices, or challenge learners.</td>
<td>0 1 2 3 4 5</td>
</tr>
<tr>
<td>• The graphics or animations enhance the learning process within practice, test, example, and text.</td>
<td>0 1 2 3 4 5</td>
</tr>
</tbody>
</table>
## Exercise 1-2. Rating Guide for Online Courses (continued)

<table>
<thead>
<tr>
<th>Evaluation Plan</th>
<th>The quality of this course is:</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. There is a Level 1 evaluation for feedback.</td>
<td>1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>2. There are instruments for Level 2 (pretest, post-test, interim) and for pre-assessments and testing out of content.</td>
<td>1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>3. Level 2 instruments align with the learning objectives.</td>
<td>1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>4. Online practice assessments require mastery before course completion:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Assessment feedback/scoring is provided.</td>
<td>1 2 3 4 5</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Instructional/Learning Strategies</th>
<th>The quality of this course is:</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Practice activities/exercises reinforce course content and learning objectives.</td>
<td>1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>2. There are complete instructions with each of the learning activities/exercises.</td>
<td>1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>3. The learning activities/exercises have complete and correct answers.</td>
<td>1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>4. Instructional strategies, tools, and instruments provide for the application of knowledge to the job.</td>
<td>1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>5. There are printable job aids.</td>
<td>1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>6. There are a variety of activity and scenario settings.</td>
<td>1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>7. Knowledge/skill gap analysis is used as a pre-assessment tool to allow learners to move past certain content if they succeed in that area of the pre-assessment.</td>
<td>1 2 3 4 5</td>
<td></td>
</tr>
</tbody>
</table>
## Exercise 1-2. Rating Guide for Online Courses (continued)

<table>
<thead>
<tr>
<th>The quality of this course is:</th>
<th>Comments</th>
</tr>
</thead>
</table>

### Technical Support

1. There is administrative support available. | 1 2 3 4 5 |
2. There is technical support available. | 1 2 3 4 5 |
3. There is compatibility with common web browsers. | 1 2 3 4 5 |
4. Quality of Service (QOS) statement indicates:
   - what will be provided
   - how it will be provided
   - level of system/network reliability (99.999 is ideal). | 1 2 3 4 5 |

### Enhanced Capabilities

1. The course contains streaming audio (voice and/or sound effects) and video, which enhance learning.
   - It is integrated into the instructional design. | 1 2 3 4 5 |
2. There is collaboration among learners, which enhances learning:
   - It is integrated into the instructional design.
   - There are virtual team rooms.
   - Participants are able to share documents. | 1 2 3 4 5 |
3. There is a place for noncourse participant interaction (coffee shop). | 1 2 3 4 5 |
4. There is online mentoring (virtual or person), which enhances learning:
   - It is integrated into the instructional design.
   - Mentor and learner have required outcomes. | 1 2 3 4 5 |
5. Online interactions link to and support learning objectives. | 1 2 3 4 5 |