HIV Prevention Research Tools

Presenter Guide

____

Name

BE THE GENERATION

TO END THE AIDS EPIDEMIC

INFORMATION ABOUT THIS TRAINING

Welcome to the Presenter's Guide for "HIV Prevention Research." Be sure to review this guide thoroughly before teaching the workshop. The information you find in this guide will help you prepare for your workshop experience.

Training Description

As part of delivering Scientific Information Training and Transfer (SITT) to Be the Generation (BTG) Bridge Partners, an HIV prevention research module has been developed to provide a basic awareness and understanding of prevention modalities (vaccines, PrEP, and microbicides). This workshop is intended to provide information for community members and AIDS service and community based organization staff members funded by the Division of AIDS of the US National Institute of Allergy and Infectious Diseases (NIAID), a part of the National Institutes of Health. The places where this training will be delivered involve multiple U.S. locations. This training has been developed to create consistent messages for a variety of people in different locations with different knowledge and experiences.

Preventing HIV infection is our best hope for stopping the AIDS epidemic. It is, therefore, important to promote awareness and understanding of HIV prevention research and to build public support for this work. Toward this end, researchers often partner with a variety of individuals and groups in the community to build awareness, understanding, and support. Successful partnerships among the following can make a difference:

- Community leaders
- Local and national organizations
- Health professionals
- Educators

Contact Information

- For technical assistance or questions about the module, please contact HANC/Legacy staff at btg@hanc.info.
- If you would like to editable slides for your presentation, please contact HANC/Legacy staff at btg@hanc.info.

Workshop Objectives

In this workshop, we will provide basic information about HIV prevention research tools in simple terms. This objective will be met through the use of informational materials (the Participant Guide) and numerous small and whole group activities and discussions. This course will be most successful with people who feel comfortable sharing questions and information.

This project was supported through Federal funds from the Division of AIDS (DAIDS), National Institute of Allergy and Infectious Diseases, National Institutes of Health, Department of Health and Human Services Grant # UM01 AI068614: "Leadership Group for a Global HIV Vaccine Clinical Trials (Office of HIV/AIDS Network Coordination)."

Audience

This training has been designed for participants with little or no knowledge of HIV prevention research. In some locations, the training can be used as a refresher with more knowledgeable participants.

For participant groups with a variety of knowledge and experience, ask more experienced participants to share their understanding with members of the group who have less knowledge and experience. After introductions early in the session, try to intermingle participants throughout the room so that small groups contain experienced and inexperienced participants in them. This intermingling will provide an appropriate interaction level during discussions and activities. The primary audience for this training is:

- Community Advisory Board (CAB) members
- Staff members assigned to support CABs
- Trial investigators worldwide
- Other worldwide advisory groups, administrators, conference attendees

Note, in some training venues, participants may have little or no reading skills. In these situations, the instructor will need to provide the content verbally. It is recommended that the PowerPoint presentation be used in lieu of the Participant Guide for these situations.

The reading difficulty for this training is at the 8th grade level. However, the use of technical terms and phrases has increased the reading difficulty in some sections.

Suggested Number of Workshop Participants

The ideal number of workshop participants is between 9 and 16. The activities and discussions are developed so that there is interaction between participants and the presenter within a small- or large-group format (3 or 4 small groups of 3-4 participants per group). Presenters should be prepared to adjust the content of the activities and discussions as needed. Additional information about how to customize this workshop is provided later in this guide.

Training Format

This training has been developed for maximum flexibility for a variety of venues. The workshop version can be delivered in its entirety (one day) or broken down into various modules for shorter sessions.

Prerequisites

There are no prerequisites for this training.

Evaluations

Because of the anticipated skill levels of participants, a Level I evaluation should be administered at the end of the workshop. This evaluation is sometimes referred to as a "smile sheet." It evaluates participant satisfaction only, not participant learning. The Level I (Workshop) evaluation should be provided, as needed, depending on the workshop delivery organization/site.

A Level II evaluation attempts to assess the extent participants have advanced in skills, knowledge, or attitude. This workshop, because of the target population, offers an optional informal Level II evaluation that involves a quiz (pre/post-tests) delivered by a series of questions informally answered at the beginning and end of the training session. To reduce stress for participants with low reading skills, the presenter should be prepared to read the questions and log individual participant correct and incorrect responses, if at all possible. Ideally, the presenter should have a list of participants and their scores for the quiz (pre/post-tests). Look for a higher number of correct responses in the quiz (post-test) as an indicator of success.

An observer is also helpful for workshop sessions to record individual skill and knowledge improvement throughout the workshop. This record should include comments about areas of difficulty, suggestions for improvement, and what additional training may be recommended or needed. Ideally, identification of other training interventions would be useful and appropriate, including self-study, web courses (if available), one-on-one coaching, mentoring, etc.

Safety and Comfort Information/House Rules

Announce the following information for participant comfort and safety at the beginning of each training session:

- Fire: Tell participants if there are any fire alarm drills planned that day; show participants the nearest exits and tell participants where to gather.
- Restrooms: Tell participants where the nearest restrooms are located.
- Messages (if available): Tell how any messages for participants will be handled (for example, a message board).
- Breaks and lunch: Provide times and locations of breaks and lunch.
- Smoking: Provide a smoking location and local smoking policies.
- Participation: Remind participants of the importance of sharing and contributing to discussions and activities.

Presenter Checklist

Because of the wide variety of training locations, the list below is optimal. However, the presenter should be prepared to accommodate a variety of training environments where the optimum isn't available.

- Laptop to show PowerPoint presentation
- LCD projector and screen
- Blank flip charts/white boards and markers
- Paper and pencils/pens
- Participant Guides (one per participant)
- Name tags and/or table tent cards (1/participant)
- Masking tape
- HIV Prevention Research Assessment: An optional quiz (pre/post-tests) is used at the beginning and end of the workshop. This optional quiz (pre/post-tests) can be used as participants arrive or during the introduction. Quiz answers will be reviewed at the end of the workshop.

- Prevention Tools activity
  - Prevention Tools Activity Cards (make 13 cards total; copy in black and white; single sided; cut cards apart on the dotted lines)
  - Prevention Tools Activity Answer Sheet (3-page handout for presenter only)
- Course evaluation (Level I at a minimum; the Level II quiz (pre/post-tests) is optional

Some locations may have difficulty showing a PowerPoint presentation. For locations with limited visual aid equipment, the PowerPoint slides with activities and discussions can be printed individually and given to participants to write on. Do not print the hidden notes and hidden slides.

Timing Matrix

This workshop should last approximately 5.30 hours:

- 4.45 contact hours
- 45 minutes for lunch
- Provide an additional 30 minutes for the optional quiz (pre/post-tests)

Module/Section	Estimated Timing
Staff arrival, setup, consent form to observers and presenter, pre-quiz to attendees as they arrive	30 minutes
Welcome and introduction	15 minutes
What Is HIV Prevention and the HIV Combination Prevention Toolbox?	45 minutes
What Are HIV Prevention Tools and How Are They Used in HIV Prevention Research? (this section should be started before the break and continued after the break)	1 hour
Lunch	45 minutes
What Are HIV Prevention Tools and How Are They Used in HIV Prevention Research?, continued	1 hour, 30 minutes
Conclusion, post-quiz, and evaluation	45 minutes
Total Time	5 hours, 30 minutes

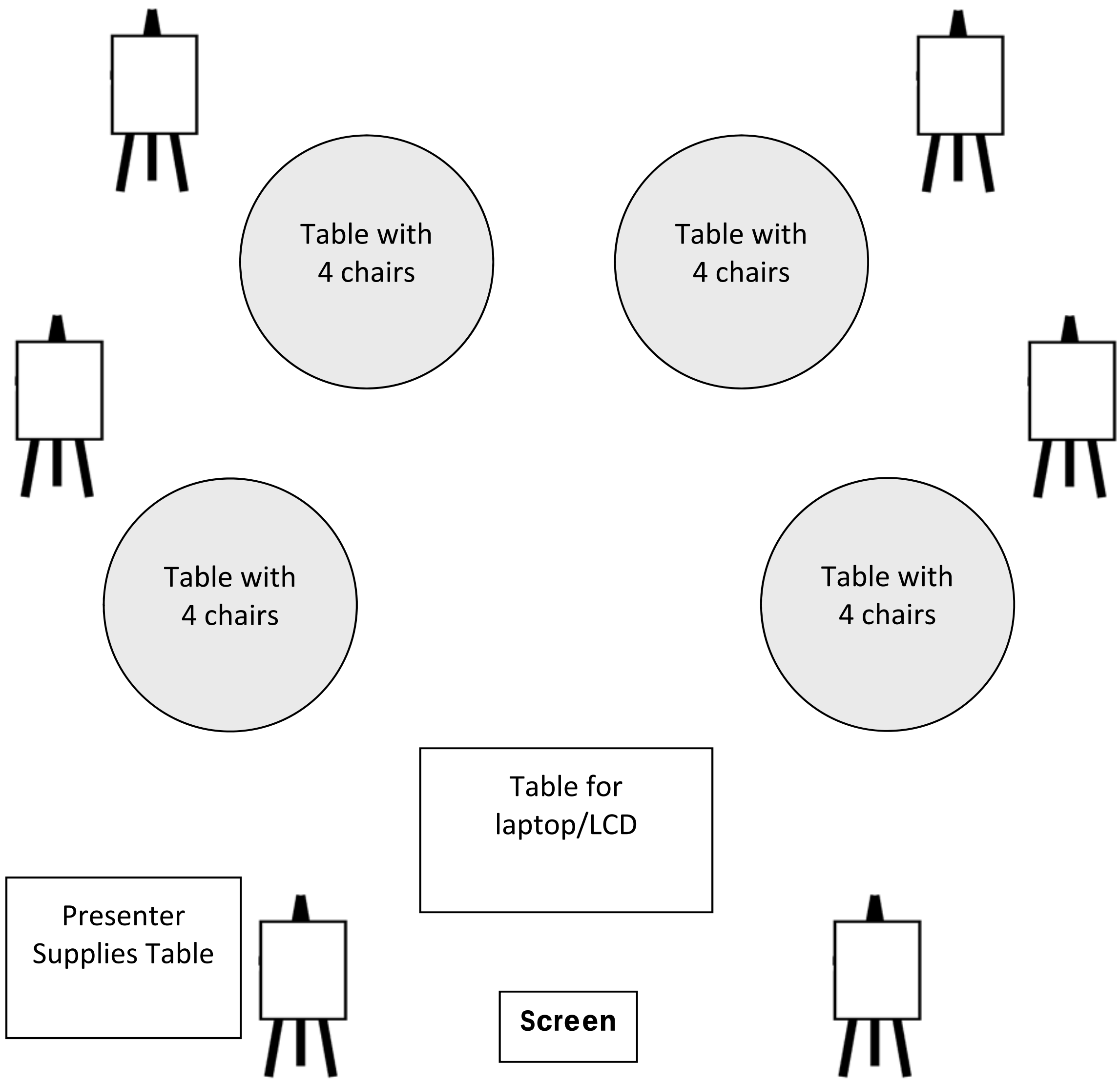
Activity Map

Module	Timing	Activity	Materials Used/Notes
Introduction	5 minutes	Introductions (whole group activity)	None
	15 minutes	Optional quiz (pre-test) (individual activity)	HIV Prevention Research Assessment (handout)
What Is HIV Prevention and HIV Combination Prevention Toolbox?	15 minutes	What Did You Learn? (small group activity followed by a presentation and whole group discussion)	None (worksheet is in the Participant Guide)
What Are HIV Prevention Tools and How Are They Used in HIV Prevention Research?	10 minutes	What Did You Learn? [PrEP] (small group activity followed by a presentation and whole group discussion)	None (worksheet is in the Participant Guide)
	10 minutes	What Did You Learn? [Vaccines] (small group activity followed by a presentation and whole group discussion)	None (worksheet is in the Participant Guide)
	10 minutes	What Did You Learn? [Microbicides] (small group activity followed by a presentation and whole group discussion)	None (worksheet is in the Participant Guide)
	35 minutes	Prevention Tools Activity	Prevention Tools Activity Cards (13 cards total on 2 pages; copy in black and white; single sided; cut cards; distribute 1 card to each person; if there are more than 13 people in the class, 2 people can share a card) Prevention Tools Activity Answer Sheet (3-page handout for presenter only)

Conclusion	30 minutes	Optional quiz (post-test) (individual activity)	HIV Prevention Research Assessment (handout)

Room Layout

The most effective room arrangement is tables that will accommodate small group activities, arranged for participants to see each other, the presenter, and the presentation slides/flip charts. However, presenters should be prepared to work with whatever set-up is available.



Presenter Guide Format and Features

This Presenter's Guide is designed for presenters to prepare for the training session. As a wide variety of training locations are expected, this guide contains important set-up information and background material to help ensure a successful workshop.

The PowerPoint presentation for this workshop contains the details for delivering the material. Presenters can print out the PowerPoint presentation in "Notes" view to see detailed instructions for each slide.

An average of 2-4 minutes is needed to cover the content for each slide. Activity and discussion slides will require additional time (see the Activities section of this Presenter's Guide).

General Information about the PowerPoint Presenter Notes

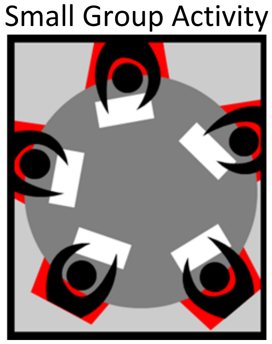
- Every heading in the Participant Guide will have a corresponding slide to make it easier for participants to follow along.
- Each notes section identifies which page of the Participant Guide relates to that slide.
- The statement "Allow for questions and discussion" is inserted in the notes section for those slides that may require more explanation—check participant reactions and body language to make sure they are comfortable before moving to the next slide.
- There is a lot of information given in this workshop—the presenter notes are designed to keep the workshop moving in order to complete the workshop in a timely fashion.
- The audience for this course may lack knowledge about the content provided and may need extra time to read the information on the slides. Read and refer to the content on the slides to make sure participants both **hear** and **see** the information on the slides. Depending on presenter experience and style and the reading level of the participants, how much and when to read the slide content can be adjusted as needed.

- The “Tell participants before reviewing the slide content” information in the PowerPoint notes section is very important as an introduction to what is on the slide. This “script” is also helpful for less experienced presenters to ensure that essential information in the Participant Guide is delivered during the workshop:
  - Key information is on the PowerPoint slide, including graphics to add clarity.
  - Other supplemental content from the Participant Guide is included in the notes section and should be spoken by the presenter.
- The PowerPoint was designed using an approved template and standardized formatting. Any adjustments to the PowerPoint should follow the template.
- The notes page should be viewed in the "Notes Page" view for the correct formatting to show.
- The PowerPoint contains “hidden slides” to provide space for the additional presenter notes. These slides are labeled in “normal” view. They do not show when viewed in “slide show” view. Note also that the slide numbers for the thumbnails in “normal” view have a diagonal line through them to indicate that they are hidden.
- Most slides have been animated and they are controlled by a mouse click. The animation has been added to provide visual variety and to allow the presenter to focus on one item of content. Animation can be adjusted or deleted per presenter preference.
- All credits (references and citations) have been included in the Participant Guide only. No slides contain quotations and/or content that is not already in the Participant Guide.

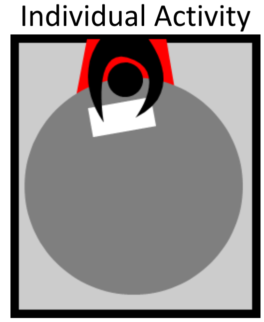
Icons Used in the PowerPoint

Whole Group Activity/Discussion

Small Group Activity



Individual Activity



Rewards

Candy is an excellent motivational tool for workshops throughout the world. Consider having a supply of candy and/or small gifts available to pass out during the workshop. Rewards can be given for:

- Correct answers
- Participation in discussions
- Contributions of insights, personal experience, and examples

How to Lead the Training (Methodology)

There are numerous instructions provided throughout the workshop materials. In order to keep specific presenter notes as concise as possible in the PowerPoint notes sections, the following guidelines are provided.

Table groups can be used for some activities and discussions. The table groups are usually naturally occurring, that is, the participants self-select those with whom they are seated. However, it is good training practice to change the composition of these groups at some point, especially during training sessions that last more than just a few hours. By arranging participants in different configurations, you can encourage more diverse dialogue and enable participants to learn from a wider cross-section of the audience.

Activities

Activity Materials

Materials for this workshop have been designed for maximum flexibility and low cost.

The Quiz

The quiz (pre/post-tests) for this workshop is optional. If the quiz is used, allow 15 minutes to administer the quiz. The quiz and answer key are provided as two separate handouts (the answer key is for the presenter only). Notes have been inserted in the PowerPoint to provide the content needed to answer each of the questions in the quiz. These notes are titled: “Information related to the optional quiz.” Presenters should add the answers to the presentation if the optional quiz is included.

Delivery options for the quiz are:

- Option 1: For participants with good reading skills, make copies of the quiz (pre/post-tests) handout and distribute. Participants can individually complete the quiz. Allow 15 minutes if participants need to read the questions themselves. After workshop completion, review the answers with the whole group. Ask participants to write their score (number of correct responses) at the end of the quiz handout. Use the same process for the end of the workshop. If possible, record scores of the pre/post-tests in order to track improvement.
- Option 2: For participants with unknown reading skills, make copies of the quiz (pre/post-tests) and distribute. Read each question to the participants. Participants can answer the questions on the handout or aloud, depending on their written skill level. Provide answers after each question. Ask participants to insert their score (number of correct responses) at the end of the handout, if able.

What Did You Learn? Activities

These activities appear at the end of every major content area and will take between 10 and 15 minutes, depending on how many questions are included. They are intended to help participants internalize and personalize what they just learned. They are designed as small group brainstorming activities followed by a presentation of answers to the whole group and whole group discussion.

As the content in these activities may be personal, encourage volunteers to participate in the whole group discussions without spotlighting individual participants since some may be uncomfortable sharing their thoughts and experiences.

Whole Group Discussions

Whole group discussions are not intended for in-depth discussion. Instead they are designed to promote interaction, and provide a break from straight lecture presentation.

The group discussion slides can be deleted, expanded, or revised, depending on an individual presenter’s experience, participant experience, and time allotted for the workshop. The general format of the discussion should be:

- Ask the question
- Ask for volunteers to answer the question aloud
- Ask for volunteers to describe how the question applies to their experience
- Build on participant responses by providing additional experiences and examples
- Thank volunteers who participate in the discussion

For workshops where participants are reluctant to speak, be prepared to answer the questions yourself and then ask participants to share their own experiences. For workshops with observers or other local subject matter experts, include them in the discussion. However, be sensitive to the possibility that local observers and subject matter experts may be intimidating for some participants, which may negatively impact open discussion and sharing.

Another technique for using whole group discussions is to divide the room into small groups and assign a question to one or two of the groups. This technique is useful for minimizing insecurities; however, it is much more time consuming. See the next section for suggestions on debriefing small group activities/discussions.

Small Group Activities

Divide the class into as many groups as needed to maximize the number of participants and their experience levels. The ideal group size is 3-4 members.

These small group activities are designed for participants to share ideas and think about the material they have just learned in new ways. Participants have an opportunity to gain confidence within their small groups and gain additional confidence when their answers are shared with the entire class. This whole-class sharing allows other participants to offer different viewpoints and experiences. Everyone learns by listening and sharing experiences.

While participants are working within their small groups, circulate among the groups. Ask open questions, such as “Have you thought about how…?” “Have you thought about why…?”, etc.

In locations where a traditional learning environment has been the standard (teachers lecture and participants listen), these small group activities will take some getting used to. Frequently encourage participants to share what they think in a positive, supportive way. Show enthusiasm and share your thanks when participants speak up. If possible, have small rewards (like candy) available to distribute periodically.

Ask for volunteers when asking groups to present their results. Until groups have confidence in their answers and presentation skills, there may be some reluctance to speak up. Discourage the same person in a group from presenting after every activity and instead ask others who have not yet spoken to do so.

Debrief notes after a group has presented:

- Encourage participants to ask for examples (be prepared to provide examples, if needed)
- Summarize the activity by reminding participants that it:
  - Can be challenging to describe difficult subjects and words in simple terms
  - Is important to make sure people understand what is being explained
  - Can be difficult for some people to communicate when they might not understand what is being said

Brainstorming

Brainstorming is a way to think of as many ideas as possible in a short amount of time and can help you look at new things in new ways. Share these rules with participants to keep them focused and open-minded. Brainstorming sessions with a group rarely last longer than 5 minutes (most ideas come out in the first 3 minutes). Individual brainstorming sessions rarely last more than 3 minutes.

The brainstorming rules are:

- Think of as many ideas as possible, without considering whether they are "good ideas" or practical.
- State each idea as it comes to you.
- Build on other people's ideas.
- Think of absurd, humorous, crazy ideas.
- Keep up a rapid pace.
- Be positive.
- Do ***not*** question, criticize, or challenge other people's ideas.
- At this stage, the point is not to filter out any suggestions which might be costly, difficult to implement, etc. It is about quantity!

At the End of Every Module/Section of the Workshop

Every major module/section of the workshop ends with an activity. New modules/sections of the workshop start with headings that are in all capital letters. Before starting a new section of the workshop, be sure to debrief the section that you just completed:

- Review what was learned in this section.
- Ask and allow for questions.
- Write any "parking lot" issues or information you need to come back to on a blank flip chart. A parking lot is where the presenter can capture all questions raised that may not necessarily be possible to answer during the workshop. You can then follow up with participants at the end of a section or before getting started again after a break. Parking lot items are also good reminders for presenters to consider covering in future workshops.
- Consider timing issues. Try to take mid-morning, lunch, and mid-afternoon breaks at the end of a module/section.

OTHER HELPFUL TRAINER INFORMATION

Adult Learners[1]

This section about adult learners is designed for less-experienced presenters.

Below is a comparison of the learning characteristics of adult and youth learners. Of course, these are generalizations with exceptions occurring in each group of learners, but you may want to keep these differences in mind as you consider your specific audience.

Adult Learners	Youth Learners
Problem-centered; seek educational solutions to where they are compared to where they want to be in life	Subject-oriented; seek to successfully complete each course, regardless of how the course relates to their own goals
Results-oriented; have specific results in mind for education	Future-oriented; youth education is often mandatory or an expected activity in a youth's life and designed for the youth's future
Self-directed; typically not dependent on others for direction	Often dependent on adults for direction
Often skeptical about new information; prefer to try it out before accepting it	Likely to accept new information without trying it out or seriously questioning it
Seek education that relates or applies directly to their perceived needs, and that is timely and appropriate for their current lives	Seek education that prepares them for an often unclear future; accept postponed application of what is being learned
Accept responsibility for their own learning if learning is perceived as timely and appropriate	Depend on others to design their learning; reluctant to accept responsibility for their own learning

[1] http://online.rit.edu/faculty/teaching_strategies/adult_learners.cfm

In summary, adult learners usually approach learning differently than younger learners:

- They are more self-guided in their learning.
- They bring more, and expect to bring more, to a learning situation because of their wider experience.
- They require learning "to make sense"; they will not perform a learning activity just because the presenter said to do it.

Teaching Strategies for Adult Learners

Adult Learner Characteristics	Teaching Strategies
Adults have years of experience and a wealth of knowledge	Use participants as resources for yourself and for other participants; use open-ended questions to draw out participants' knowledge and experiences; provide many opportunities for dialogue
Adults have established values, beliefs, and opinions	Permit debate and the challenge of ideas; be careful to protect minority opinions within the classroom
Adults expect to be treated as adults	Treat questions and comments with respect; acknowledge contributions participants make to the workshop
Adults need to feel self-directed	Engage participants in the learning process; expect participants to want more than one medium for learning and to want control over the learning pace and start/stop times
Adults often have a problem-centered approach to learning	Show immediately how new knowledge or skills can be applied to current problems or situations; use participatory techniques such as case studies and problem-solving groups
Adults have increased variation in learning styles (individual differences among people increase with age)	Use a variety of teaching materials and methods to take into account differences in style, time, types, and pace of learning

Teaching Styles

No one model of instruction will be the best for all situations. Two contrasting models are shown below; one or both or a combination could be used in this course.

Presenter-Centered	Learner-Centered
The learning objective is usually the transfer of knowledge, information, or skills from the presenter to the participants. The presenter more or less controls the material to be learned and the pace of learning while presenting the course content to the participants. The purpose of learning is to acquire new knowledge or learn new skills.	The underlying philosophy is that participants learn best not only by receiving knowledge, but also by interpreting it, learning through discovery while also setting the pace of their own learning. Presenters coach and mentor participants to facilitate their learning, designing experiences through which participants acquire new knowledge and develop new skills.

In general, participant controlled learning (learner-centered) works best when the learners are relatively mature and possess significant related knowledge or where there is no particular sequencing of the material to be learned. Control of the presentation of course materials (presenter-centered) is more appropriate when learners are less mature and lack prior knowledge. Learners who are immature or lack prior knowledge frequently make poor instructional choices if left on their own (e.g., they are unlikely to estimate correctly whether practice is needed, when sufficient mastery has been attained, etc.).

Thinking Styles

Here is a brief comparison of some different thinking styles of learners. Again, these are generalizations. Some people use more than one style, but generally each person has a preferred style. Your workshop will be most successful if you vary your style to meet the variety of thinking styles among your participants.

Thinking Styles	Characteristics
Reflective Thinkers	• View new information subjectively • Relate new information to past experiences • Often ask "why?" • Examine their feelings about what they are learning
Creative Thinkers	• Like to play with new information • Always ask "why?" • Make excellent troubleshooters • Create their own solutions and shortcuts
Practical Thinkers	• Want factual information without any "nice-to-know" additions • Seek the simplest, most efficient way to do their work • Not satisfied until they know how to apply their new skills to their job or other interest
Conceptual Thinkers	• Accept new information only after seeing the big picture • Want to know how things work, not just the final outcome • Learn the concepts that are presented but also want to know the related concepts that may not have been included

Learning Styles

Below are some of the main learning styles. Most people are predominantly one type of learner, but can often adapt to another style. Learners do tend to look for their preferred style in each learning situation because they associate that style with learning success.

Learning Styles	Characteristics	Teaching Strategies
Visual Learners	Process new information best when it is visually illustrated or demonstrated	• Graphics, illustrations • Images • Demonstrations
Auditory Learners	Process new information best when it is heard	• Lectures • Discussions
Kinesthetic Learners	Process new information best when it can be touched or manipulated	• Written assignments, taking notes • Examination of objects • Participation in hands-on activities
Environmental Learners	Process new information best when it is presented in surroundings that match learner preferences (room temperature, lighting, seating, etc.)	• Online learners • Controlled temperature, lighting, and seat comfort

Instruction designed for adult learners tends to be more effective if it is learner-centered than if it is presenter-centered. The presenter must maintain a careful balance between the presentation of new material and its applications, discussion and participation among participants, and the time available.

Preparations for Training

Learning the Material

Prior to training any course, you must thoroughly study and understand all training materials. You should be prepared to deliver all training materials as developed. We also encourage you to enhance the courses you teach by adding your own personal experience and examples. However, the first priority is to understand and complete the material as developed.

You should be prepared to answer participant questions by thoroughly understanding the content and how all of the material is used and related to the relevant topic.

Day before the Workshop

To make your training day as worry-free as possible, be certain to gather all of your materials together the day prior to the workshop. Your confidence and security during the training will depend on how many last-minute details come up on the training day. Use the "Preparations for Training—Day before Workshop Checklist" as a reminder of all the things you need to do before the workshop.

Preparations for Training—Day before Workshop Checklist

- [ ] Gather specific examples that relate to points of discussion.
- [ ] Find out from an advance registration list how many people will be in attendance so you can plan how to break the audience into small groups for exercises.
- [ ] Find out from an advance registration list who will be in attendance—you can then make any adjustments to the material to fit your participants' needs and experience.
- [ ] Be prepared to address questions that may come up in training. If you don't know the answer, it is best to acknowledge that you don't know. The question can be noted as a "parking lot item" to be followed up at a later time. If needed, you can obtain contact information for the person who asked the question, so that you can obtain the answer and contact them at a later time. Actually doing this follow-up is a great way to build trust and credibility.
- [ ] Assemble all visual aids, materials, and in-workshop examples you plan to use.
- [ ] Find out if there will be a guest speaker—if so, find out the person's name, how to pronounce the name, the professional title, and why he/she was invited to speak—talk to the guest speaker before the training, if possible. Confirm, in advance, what time the speaker is needed and when to arrive.

Day of the Workshop

Plan to arrive at least 30 minutes to an hour prior to the scheduled training time. In fact, if you arrive *one hour* before training, you'll easily have time to complete the "Preparations for Training—Day of Workshop Checklist" below. Always try to be ready to train before the participants arrive—you and your room are completely set up—so you aren't working when participants arrive. Ideally, you should be finished and able to greet participants as they arrive.

Preparations for Training—Day of Workshop Checklist

- [ ] Put your name up somewhere or wear a name tag to let everyone know who you are.
- [ ] Put a sign outside the room with: "Welcome," the name of the workshop, time that you're starting, and your name. This lets people know that they are in the right place, and this also tells people you've started in case someone arrives late).
- [ ] Make sure there are enough copies of materials—know where to get extra copies, if needed.
- [ ] Make sure audiovisual equipment is working and focused:
    - [ ] VCR
    - [ ] TV
    - [ ] LCD/laptop
- [ ] Create a "Parking Lot" list with the name of the course and the date—use a flip chart for your "board" so you can write down:
    - [ ] Things you can't answer that you'll research and report on later.
    - [ ] Comments made by your participants (for example, if a participant thinks something in the training is wrong, you can notify the training development team).
    - [ ] Any notes you want to keep to include in future training or pass on to others for follow up.

Room Setup

As the presenter, you may adjust the seating and table arrangement of the training room—within limits, of course. If possible, go to the room you'll be using the day before the workshop so you can plan any necessary changes. Be prepared to deliver in differently arranged rooms. Consider these factors when planning or changing the room setup:

- Expected number of participants
- Types of instructional activities in the session
- For small-group discussion, smaller tables that seat 3-4 people to reinforce content

Use the "Workshop Setup Checklist" to review items to consider.

Workshop Setup Checklist

☐ Is there a natural focal point or "front" on which the trainer should focus attention?

☐ Can all participants see the audiovisual screen and/or video monitor easily?

☐ Are there remote controls for the audiovisual equipment so you can move around the room?

☐ Will you need to use a microphone to be heard in the classroom? Practice with it before participants arrive to determine how close you need to stand, whether it is hand-held or on a headset and can move with you, or where a lavalier microphone should be clipped to your clothing to best capture your voice.

☐ Is there a table to hold handouts and other materials?

☐ Is there room for small-group discussions?

☐ Can the tables and chairs be moved?

☐ What shapes and sizes are the tables?

☐ Can all participants see the flip charts easily?

- [ ] Are there blank walls or corners to place the flip charts/easels around the room?
- [ ] Is there a thermostat for the room, and can it be adjusted if necessary?
- [ ] Does the lighting need to be adjusted so that the audience can see the PowerPoint presentation? Determine which light switches control the appropriate lights, and whether blinds or other window coverings need to be adjusted.

Materials Setup

You should expect that all the materials you need are available in your room—however, you should always double check the day before. When you enter the training room, you should find the items listed on the "Materials Setup" Checklist (see the next page) or be prepared to bring them with you.

Materials Setup Checklist

- [ ] Name tags and/or paper for table tent cards
- [ ] Printed materials—enough copies for all registered participants and a few extra copies
- [ ] Other print materials:
  - [ ] Blank sign-in sheet
  - [ ] Other?
- [ ] Audiovisual equipment:
  - [ ] LCD projector
  - [ ] Screen
  - [ ] Laptop
  - [ ] PowerPoint (preloaded on the laptop)
- [ ] Refreshments
  - [ ] Water
  - [ ] Cups

☐ Presentation materials:

- ☐ White board markers and erasers
- ☐ Flip chart markers
- ☐ Extra flip chart paper
- ☐ Other?

☐ Participant supplies:

- ☐ Pads of note paper
- ☐ Pencils/pens
- ☐ Participant Guides

Starting the Training Session

Starting the training session is important to set the tone for the rest of the activities. Always be ready, make sure the room is ready, and be available to greet each person as they arrive.

- Ask all participants to write down the name they wish to be called on the table tent cards and/or name tags (for example, some people prefer “Dr. Jones” or “Mrs. Smith”).
- Introduce yourself:
- For workshop with a guest speaker:
  - Introduce the guest speaker by name and why the speaker is important to the class.
  - Sit while the speaker delivers the remarks.
  - Thank the speaker when done and begin applause.

Housekeeping

"Housekeeping" is information you provide in every training workshop.

Use the "Housekeeping Checklist” below to review what participants need to know.

Housekeeping Checklist

- ☐ Provide workshop and break times—breaks are usually 15 minutes long (approximately 10:00 a.m. and 3:00 p.m.).
- ☐ Provide locations of the rest rooms.
- ☐ Ask participants to turn off cell phones/pagers, if applicable.
- ☐ Provide the local smoking restrictions.
- ☐ Emphasize that you welcome questions, comments, and personal experiences.
- ☐ Provide information about emergencies:
    - ☐ In case of fire, use the emergency exit nearest the training room (and say where it is located).
    - ☐ In case of earthquake (for earthquake-prone locations), move under the tables and stay there until the shaking has stopped, then move outside.
    - ☐ Do not use elevators, if applicable.

Introductions

Introductions are important for all members of a course to become acquainted and become comfortable. Be sure to include guests and observers in the introductions so participants know who they are. Relate the introductions to the subject matter of the course. For example:

- What personal piece of information would you like other people to know about you?
- Where do you work or go to school?

Use the "Introductions Checklist" for more information about introductions that people will remember.

Introductions Checklist

- [ ] Plan your introduction strategy/activity before you go to the workshop.
- [ ] Consider who your participants are:
    - [ ] Use an introduction game with physical activity for younger participants.
    - [ ] Use a simple verbal presentation with more experienced/mature participants.
- [ ] Introduce yourself and announce the name of the course.
- [ ] Explain why you're the presenter and your particular expertise.
- [ ] Ask everyone to write down their names on a table tent card or name tag.
- [ ] Lead the introductions.
- [ ] Allow enough time for all participants to contribute—thank each participant.

Training Delivery

Presenting Information to the Whole Group

Whether you're simply presenting material or asking questions, public speaking and training skills can be enhanced by a few guidelines:

- Stand still. If you absolutely must move, make it purposeful, such as to better hear the person reporting back from his/her small group.
- Use notes, if needed.
- Use appropriate language.
- Take your time. Remember to breathe!
- Adjust voice levels or microphone volume as needed.
- Maintain eye contact.
- Use gestures sparingly.

There are times when it's appropriate for you to sit down during the day. However, avoid sitting down while presenting new information. Some participants may have trouble seeing you if you're seated.

It's a good idea to sit down while someone else is presenting. If you're seated, you show respect for the presenter and you assume the role of participant.

Debriefing an exercise is often effective if you're seated because your participants will feel less insecure if they have any difficulty answering your questions.

As the presenter, remember that your actions will most likely inspire the same actions in your participants. There is a fine line between having fun and being distracting. Set the right example as much as you possibly can. Your professionalism will emphasize the importance of the material you present!

Take advantage of the whole room by:

- Walking around—participants will watch you as you move and pay closer attention to what you're saying (if microphone use allows).
- Moving to participants who might be disruptive—when you stand near disruptive participants they will quickly stop talking!
- Turning the back of the room into the front of the room, if only for a short time…or use the sides of the room as the front—this helps get participants' attention if they're tired after lunch.

See the "Presenting Information Checklist” on the next page for more detail.

Presenting Information Checklist

- [ ] Maintain eye contact:
    - [ ] Watch your audience—a puzzled look probably means lack of understanding, which means you need to rephrase your statement.
    - [ ] Avoid focusing on individuals when asking questions—they might feel pressured to respond when they're not prepared to respond.
    - [ ] Look at anyone who's answering your question—that person deserves your full attention.
- [ ] Use notes, if needed:
    - [ ] Avoid reading the script of the material—be familiar with the presentation, and try to deliver the information in your own speaking style (it's ok to use your notes/book during the first few sessions).
    - [ ] Stay focused—questions by participants or any spontaneous occurrences can make it difficult to gracefully return to scripted lines.
    - [ ] Consider “talking points,” similar to mini-headings, to stay on track, ensure that you cover all necessary material, and ensure all talking points are presented in the correct order. How the points are explained is up to the presenter, and should feel natural.
- [ ] Take your time:
    - [ ] Everything moves faster for the presenter than it does for the participant.
    - [ ] Repeat important information because participants understand facts and ideas with repetition over time.
    - [ ] Adjust your speaking speed to allow participants’ thinking to keep up with what you’re saying. Think of your pace as though you were reading a story to a child.
    - [ ] Pause between sentences so participants can process what’s been said and internalize the thoughts.
- [ ] Use the room to provide variety:
    - [ ] Move the "front" of the room to get and keep everyone's attention and put different participants in the front of the class.
    - [ ] Put flip charts and white boards in the back of the room so you can change the focus and break up any noisy participants.
    - [ ] Stand near any disruptive participants—they will stop talking if you're close.

Presentations by Participants

Discuss the rules of courtesy while people are presenting. No talking!

Lead the applause after the presentation, then debrief. Consider yourself part of the audience, have a seat in one of the participant's seats.

When you’re listening to someone speaking, give the speaker your full attention. It's easy to use the time to use your laptop, pick up your notes, etc. However, the message you’re sending is “OK, hurry up and give me your answer so I can get back to my presentation."

If you think your participant presenters can’t be heard…instead of interrupting and asking them to speak louder, move toward the back of the room because speakers will automatically follow you, therefore speaking to the room instead of the front. Share your microphone if needed.

If you *think* the speaker can’t be heard, rephrase what was said to make sure everyone gets the message.

Asking Questions

Asking questions helps you include the participants in the workshop without you "lecturing."

Try to be sensitive to the insecurities of your participants until they get to know you and the other people in the workshop. Most participants will be reluctant to speak up until they're confident their answers will not result in embarrassment.

For questions that you're not confident the participants can answer, ask for participants' "feelings" about a question.

For example:

- "What do you feel is one way to handle this situation?"
- "Can you give me an example from your experience?"

Use the "Asking Questions Checklist” on the next page to help you get the responses you need.

Asking Questions Checklist

- [ ] Reinforce learning with questions to:
    - [ ] Summarize points.
    - [ ] Encourage participants to ask questions if ideas are unclear or confusing.
    - [ ] Include all participants instead of focusing on an individual.
- [ ] Ask related questions after answering participant questions:
    - [ ] To maintain control of the situation
    - [ ] To involve other participants
- [ ] Set ground rules to keep participants from taking over the discussion:
    - [ ] Avoid having one participant answer two questions in a row by saying “now let’s let someone else answer the next question”.
    - [ ] Call on participants for answers in the order they appear in the room if there are no volunteers—be careful in case participants are insecure.
- [ ] Handle incomplete or incorrect answers:
    - [ ] Acknowledge that a more complete answer is needed.
    - [ ] Restate the correct part of the answer.
    - [ ] Open the question to the whole group.
    - [ ] Check the whole group for understanding before moving to the next question.
- [ ] Reinforce correct answers:
    - [ ] Acknowledge and affirm the correct answer.
    - [ ] Ask if anyone else has a different answer or point that can be considered.
    - [ ] Clarify and sort any additional responses with the whole group.

Leading Discussions

Leading effective and animated discussion takes skill and courage. Some presenters feel it:

- Is difficult to control how a group will respond
- Puts participants on the spot to provide answers

A problem-solving discussion is a very effective learning technique when the group openly enters into the process. Use a discussion when:

- There's more than one correct answer.
- There's no single, comprehensive answer.
- There's confusion about the correct answer.
- Answers from several participants are needed to contribute to the group's answer of the question.

Ask for disagreement! Disagreement is important to encourage everyone to engage in active dialog. Disagreement is also an important part of science, and leads to new research questions.

Use the "Leading Discussions Checklist" on the next page for more information.

Leading Discussions Checklist

- ☐ Allow for silence after asking a question to:
  - ☐ Provide an opportunity for participants to think about the question.
  - ☐ Assemble the facts that are needed to answer the question.
  - ☐ Consider ways to explain answers to the group.
  - ☐ Decide whether or not someone else will take the risk of speaking out loud.
  - ☐ Determine whether the presenter will answer the question.
- ☐ Use a flip chart or whiteboard to write key words and phrases as participants volunteer their responses.
- ☐ Raise all pertinent points, then either:
  - ☐ The presenter can summarize the answer.
  - ☐ A participant can be asked to do the summary.
- ☐ Use partial or partially correct answers as a foundation:
  - ☐ Restate the question and responses received.
  - ☐ Ask participants to "piggyback" their answers onto the correct portion of an answer already received.
- ☐ Check for understanding of any/all answers:
  - ☐ Created by a group
  - ☐ Summarized by an individual
- ☐ Listen carefully to participant responses:
  - ☐ Pay attention to what people feel.
  - ☐ Pay attention to the content of the response.

Visual Aids

Visual aids help you present your information in a completely different way than lecturing.

Learners absorb information in a variety of ways. The more opportunities you have of reinforcing information using different delivery methods, the more likely your participants will remember what you're telling them.

The most important thing for you is to consider how to use your visual aids for the most effect.

Use the "Visual Aids Checklist" for more information.

Visual Aids Checklist

- ☐ Practice using visual aids so you're comfortable.
- ☐ Make sure you don't block the material you're trying to show.
- ☐ Try to keep talking as you work with the equipment.
- ☐ Distribute handouts when they are introduced so participants can follow along. Do not distribute handouts before they are introduced because participants tend to read the handout and miss what is being said.
- ☐ Face participants as you speak.
- ☐ Display the visual that corresponds to what you're saying.

Flip Charts

Sometimes there are times when flip charts can be used to demonstrate an example and/or provide reference during a workshop.

Use the “Flip Charts Checklist” for more information.

Flip Charts Checklist

- ☐ Abbreviate words to save writing time.
- ☐ Have plenty of fresh markers available.
- ☐ Talk to the participants, not the flip chart.
- ☐ Write and then talk—don’t do both together.
- ☐ Be concise.
- ☐ Make sure letters and numbers are one inch high.
- ☐ Balance the words and the white space.
- ☐ Include headings.
- ☐ Make sure handwriting is legible and spelling is correct.

White Boards

The same kinds of rules apply for writing on white boards or chalkboards as you use for producing flip charts. Remember, in most cases, whatever you write on the board isn't a permanent record. Using white boards/black boards, however, is a less-expensive method of documenting participants' comments.

See the "Using a White Board Checklist" for training tips.

Using a White Board Checklist

- [ ] Be neat.
- [ ] Make sure your words/pictures can be seen from anywhere in the room.
- [ ] Allow participants an opportunity to absorb the material you write.
- [ ] Make sure you have an eraser handy and plenty of markers/chalk of different colors.
- [ ] Make sure you use erasable markers on white boards.
- [ ] Use an electronic white board if you need, or want to keep a record of what you've presented.
- [ ] At the end of your training session, clean the board for the next user.

Computer Presentation—PowerPoint

Computer presentations using PowerPoint can be exciting, beautiful, and easily changed for each workshop. Always view a PowerPoint presentation before training to make sure the colors project clearly. Become familiar with using an LCD projector so you don't fumble with the equipment during the workshop. Know how to synchronize your computer to the projector in order to display your slides.

PowerPoint is not easily turned off between slides, so you might find participants become distracted. During activities (when the slides are not being used), you may find it helpful to cover the projector or display a blank screen.

Concluding the Training Session

Participant Evaluation

Some agencies/sites may provide a participant evaluation form (the Level I evaluation). If so, ask for honest comments so you know what you're doing right and what can be improved. Presenters should look at the participant evaluations so they know how the participants felt about the session and the presenter's performance.

- Collect and review the participant evaluation form.
- Thank all participants for attending.