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**LEADERS AS TEACHERS
FIELD MANUAL**

**Learning and Development
(2009-2010)**

OSS ARCHIVES

~~WASHINGTON~~

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INTRODUCTION

This manual is designed to provide guidance to L & D on the process and resources for working with LAT subject-matter experts. The sequence of events and activities are outlined, along with relevant instructions and resource materials.

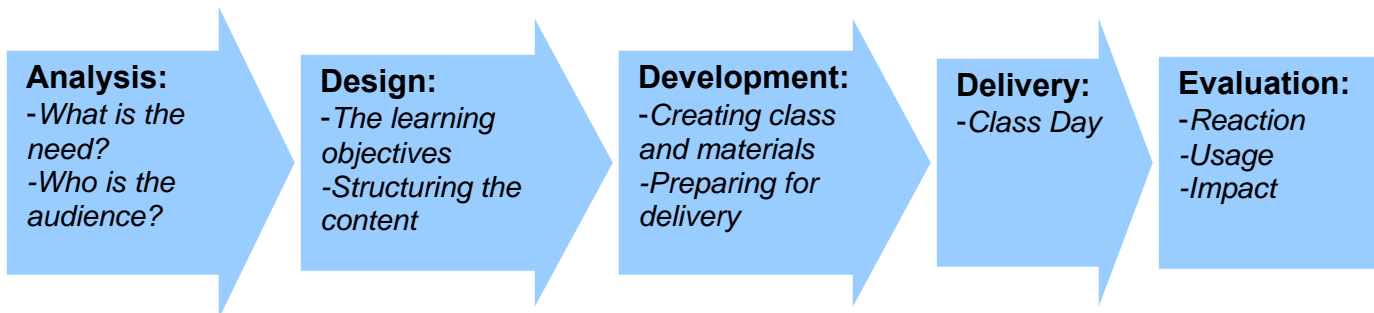
Topics

- Responsibilities
- Workflow
- Milestones for developer SMEs
- Analysis
- Audience analysis
- Topic area
- Learning objectives
- Sections (what common components can be found in each)
- LAT lesson plan template
- Guidelines for Participant Materials and Job Aids

Responsibilities:

SME – Subject Matter Expert	L & D Contact
Supply content knowledge, develop materials for facilitator and participants (if any), revise materials, and deliver training.	Learning advisor, materials review, ideas for activities, development templates and assistance, presentation skills training, regular status check-ins.

High Level Workflow



MILESTONES

Discuss the following key milestones with your LAT SME. All will need to be accomplished between now and when they deliver their session:

Blue text indicates instructions for, or information needed from, your SME Leaders.

Phase	Activity	Date Due
Analysis	1. Analyze knowledge gap or training need/relevant topics (May be done already)	
Design	2. Participate in development discussion/introduction to the Lesson Plan Template (This meeting)	
	3. Create learning objectives	
Development	4. Develop facilitator materials using the L & D Lesson Plan Template	
	5. Develop Participant materials	
	6. Return first drafts of materials for stakeholder/L & D review	
	7. Participate in feedback session	
	8. Revise materials based on stakeholder/L & D feedback	
	9. Provide final draft of materials for stakeholder/L & D review	
	10. Attend ½ day presentation skills “crash course” session	
	11. Make any final changes to materials	
Delivery	12. Present training!	
Evaluation	13. Launch and invite participants to give feedback	
	14. Analyze and review the feedback	

PHASE 1-ANALYSIS:

What: Topic survey, initial discussions with BU stakeholders.

Audience analysis:

What level of subject knowledge do participants who will be attending already have?

Replace text in this box with the answer to the above question.

Describe the general level of knowledge training attendees will have when they arrive for your session. Is everyone at about the same level? If not, how will you determine what level to pitch to? How comfortable will they be discussing the topic?

Topic area:

What high-level topic will this session cover?

Replace text in this box with the answer to the above question.

If someone asked you, "What's your class about?" What would you say? Add that answer here. These aren't the formal learning objectives—that comes next.

Examples:

Cross country skiing, Badminton, World religions

PHASE 2- DESIGN

Learning objectives:

What are the learning objectives for the training? Objectives answer the question, “What will a participant in the training know or be able to do differently following training?” Objectives reveal the depth with which topics will be learned and should be OBSERVABLE.

The L & D contact person should assist with the process of writing the objectives. These will be the foundation of the training course.

Format:

Audience – Who is the learner?

Behavior – Verb describes what the person will be able to DO

Condition – Under what circumstances must the behavior take place?

Degree –To what standard of performance?

Replace text in this box behavioral learning objectives.

Learning Objective 1

Learning Objective 2

Learning Objective 3

Examples:

Participant will be able to correctly put on a pair of cross-country skis

Participant will be able to name the 17 major world religions in order of their number of followers

Participant will execute a hairpin net shot against a live opponent

PHASE 3 – DEVELOPMENT

Review the parts of the Lesson Plan Template with the SME trainer.

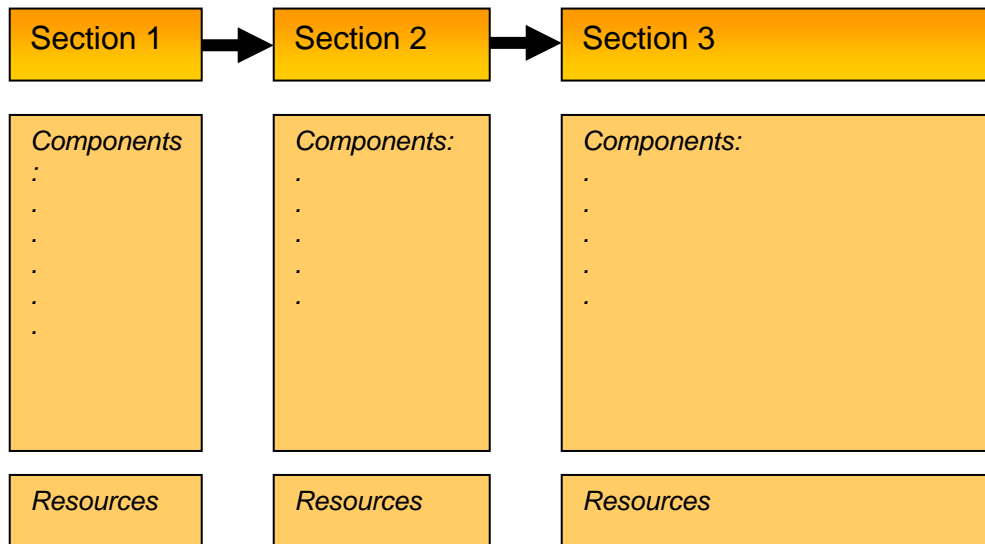
Each learning objective should have its own section, and the same principal components.

Section Component	What's it for?
1. Introduction (hook)	The introduction should break participant preoccupation, focus them on the topic, engage their interest, and create curiosity to hear more.
2. Content Delivery	This is the actual delivery of new information to participants. <i>About 1/3 of the instructional time should be spent on this.</i> <ul style="list-style-type: none"> • Lecture • Video • Demonstration • Written information • Guided discussion
3. Examples/ analogies/ stories	Illustrate how the information applies in real-life situations and its importance. Include relevant data and statistics that explain further.
4. Check for understanding	Ask open-ended (not yes/no) questions to gauge learner understanding. <ul style="list-style-type: none"> • What questions do you have? • What didn't I explain fully? • What's not clear to you? • What reaction do you have to this?
5. Participant practice	An activity that engages the learner to help them apply the knowledge or skill just covered. For skill-based objectives the activity should simulate the task they would need to accomplish in real life. For knowledge-based objectives the activity will require learners to demonstrate they can apply their knowledge in new situations.
6. Feedback & coaching	This is the most important part of the training. People learn most when they take some kind of action or make a decision and then see the consequences of that action. <i>About 2/3 of training time should be devoted to practice and feedback.</i>

Leaders as Teachers Field Guide

Section Component	What's it for?
7. Connect to job relevance	Relate the content to work that actually is going on. Answer the participant question, "okay, so how does this affect me? Why should I care?"
8. Summary review, and final questions	Review the key points and summarize the objective of the section. Tie recent learning back to earlier points (if any). Answer any remaining questions.
9. Closing	A final takeaway thought regarding the section content. Offers a broad perspective, quote, thought-provoking question that leads into the next section (transition).

Sections will vary in length, and can be strung together to create the entire training course. Each section may require additional resources be created, either for the facilitator (e.g. a poster) or for the participants (e.g. a handout).



LESSON PLAN TEMPLATE

Use this template by replacing the blue text with information for your project. Each section focuses on one objective, and has presentation, practice and feedback components.

TITLE:	<INSERT TITLE>
AUTHOR:	<INSERT AUTHOR>
<i>Describe the session OPENER (Duration=X minutes):</i> <INSERT INSTRUCTIONS & STEPS>	

<i>Repeat this block for each section</i>	
Section I, II, III etc.: <i>What LEARNING OBJECTIVE is covered in this section?:</i> <INSERT OBJECTIVE>	
<i>Outline the CONTENT to be delivered and the METHOD used (Duration=X minutes):</i> <INSERT CONTENT OUTLINE & METHOD> <i>List EXAMPLES + ANALOGIES + STORIES to use. Include relevant DATA/STATISTICS (Duration=X minutes):</i> <INSERT EXAMPLES> STOP: <i>Check for understanding (Duration=X minutes):</i> <LIST OPEN-ENDED QUESTIONS>	
<i>Describe participant PRACTICE or ACTIVITY here (Duration=X minutes):</i> <INSERT DESCRIPTION AND STEPS/INSTRUCTIONS> STOP: <i>Debrief activity and provide FEEDBACK to learners (Duration=X minutes):</i>	
<i>Explain the relevance and CONNECTION between this subject matter and the job (Duration=X minutes):</i> <INSERT EXPLANATION OF RELEVANCE>	
<i>SUMMARIZE key learnings and main points (Duration=X minutes):</i> <INSERT SUMMARY OUTLINE> STOP: <i>Ask for final questions. Connect content to previous topics.</i>	

Session CLOSING (Duration=X minutes):

<INSERT DESCRIPTION OF CLOSING & TRANSITION>

(Include discussion of participant satisfaction surveys that will be sent via e-mail, and the importance of providing feedback so we can make the training more enjoyable and effective.)

😊 **Helpful hint:** *Determining how long each section should take is one of the most difficult things to do in design. Practice your delivery to get an estimate of the duration to complete each section component. That way, when you're actually delivering the training you'll have some touch points along the way to tell you if you're going too fast or slow.*

GUIDELINES FOR PARTICIPANT MATERIALS AND JOB AIDS

Materials you create for participants of your training help to anchor the learner's attention, provide a handy point of reference, and serve as a place to take notes.

Your Learning and Development contact can assist you with ideas for creating and formatting materials. This way all *Leaders as Teachers* participant materials will have a consistent look and feel.

Some basic guidelines appear below.

- Body text: Use 12 pt. type or larger with standard fonts (Arial, Times New Roman) for readability.
- Each page of the participant materials should be numbered in the footer (12 pt.).
- Include the *program name*, *date of last revision* and the *filename* in participant materials footer (6-8 pt.). (See example at the bottom of this page)
- Number the steps of a process or instruction. Bullet related items that are in a list. Avoid processes with more than 10 steps or extensive use of sub-points as they can easily become confusing to learners.
- Leave plenty of white space on the page, where learners can take notes. If necessary, split one page into two separate ones to free-up space.
- Bullet out your key points wherever possible, rather than writing extensive narrative or including large blocks of text.
- Graphics should be relevant and explain or further illuminate the subject matter. Great examples to include are charts, models, maps, tables, and workflows. Clip-art or pictures that offer nothing beyond visual appeal should be used sparingly, if at all.

LESSON TEMPLATE

TITLE:	
AUTHOR:	
<i>Describe the session OPENER (Duration=X minutes):</i>	

<i>Repeat this block for each section</i>
Section
<i>LEARNING OBJECTIVE:</i>
<i>CONTENT and METHOD (Duration=X minutes):</i>
<i>EXAMPLES + ANALOGIES + STORIES (Duration=X minutes):</i>
STOP: <i>Check for understanding (Duration=X minutes):</i>
<i>Questions to ask:</i>
<i>PRACTICE or ACTIVITY (Duration=X minutes):</i>
STOP: <i>Debrief activity and provide FEEDBACK to learners (Duration=X minutes):</i>
<i>Relevance and CONNECTION to the job (Duration=X minutes):</i>
<i>SUMMARIZE (Duration=X minutes):</i>
STOP: <i>Ask for final questions. Connect content to previous topics.</i>

Leaders as Teachers Lesson Plan Template

Repeat this block for each section

Section I

LEARNING OBJECTIVE:

CONTENT and METHOD (Duration=X minutes):

EXAMPLES + ANALOGIES + STORIES (Duration=X minutes):

STOP: *Check for understanding (Duration=X minutes):*

Questions to ask:

PRACTICE or ACTIVITY (Duration=X minutes):

STOP: *Debrief activity and provide FEEDBACK to learners (Duration=X minutes):*

Relevance and CONNECTION to the job (Duration=X minutes):

SUMMARIZE (Duration=X minutes):

STOP: Ask for final questions. Connect content to previous topics.

Leaders as Teachers Lesson Plan Template

Repeat this block for each section

Section II

LEARNING OBJECTIVE:

CONTENT and METHOD (Duration=X minutes):

EXAMPLES + ANALOGIES + STORIES (Duration=X minutes):

STOP: *Check for understanding (Duration=X minutes):*

Questions to ask:

PRACTICE or ACTIVITY (Duration=X minutes):

STOP: *Debrief activity and provide FEEDBACK to learners (Duration=X minutes):*

Relevance and CONNECTION to the job (Duration=X minutes):

SUMMARIZE (Duration=X minutes):

STOP: Ask for final questions. Connect content to previous topics.

Leaders as Teachers Lesson Plan Template

Repeat this block for each section

Section III

LEARNING OBJECTIVE:

CONTENT and METHOD (Duration=X minutes):

EXAMPLES + ANALOGIES + STORIES (Duration=X minutes):

STOP: *Check for understanding (Duration=X minutes):*

Questions to ask:

PRACTICE or ACTIVITY (Duration=X minutes):

STOP: *Debrief activity and provide FEEDBACK to learners (Duration=X minutes):*

Relevance and CONNECTION to the job (Duration=X minutes):

SUMMARIZE (Duration=X minutes):

STOP: *Ask for final questions. Connect content to previous topics.*

Session CLOSING (Duration=X minutes):

<INSERT DESCRIPTION OF CLOSING & TRANSITION>

(Include discussion of participant satisfaction surveys that will be sent via e-mail, and the importance of providing feedback so we can make the training more enjoyable and effective.)