International Council on Archives / Conseil International des Archives

Section for Archival Education and Training /Section pour l'enseignement de l'archivistique et la formation des archivistes

Training the Trainer Resource Pack

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The Archives-Skills Consultancy
on behalf of the ICA Section on Archival Education and Training

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Contents

Introduction to the ICA/SAE Training the Trainer Resource Pack

Training in the archives and records management field

It is not easy for trainers and educators in the archives and records management field to find formal ways of learning the necessary skills and expertise to teach. Educators, and more particularly trainers, are frequently only teaching as part of a practitioner's heavy workload. Whilst they are often experts in their own field or specialism with much to pass on to other members of the profession and its supporting para-professional staff: this does not guarantee effective training for those wishing to learn from them. As the experts it is appropriate that they should teach the next generations of practitioners and although some are naturally gifted teachers, there is always something to learn to improve delivery of training. Moreover, in many parts of the world training is very expensive to deliver and cascaded learning, where a few people attend formal training and then feed it back to their colleagues and institutions, is an effective and a cheaper option.

This resource pack is intended for anyone who wants some guidance or direction in planning, organising and delivering effective training for both professionals and support staff whatever their working or learning environment. The bulk of the pack addresses the various techniques for delivering training but it also covers the practical administrative tasks that are essential for successful training courses and which underpin the training content.

ICA Section on Archival Education and Training

The Training the Trainer Resource Pack is a deliverable of the 2000–2004 Medium Term Plan of the ICA/SAE (International Council on Archives Section on Archival Education and Training) Steering Committee. For more information on the Section see: http://www.ica-sae.org/.

About the authors

Margaret Crockett and Janet Foster are archives and records management consultants based in the UK. They have delivered training in Mongolia, Estonia, Latvia, Malta and Hungary as well as running their own on-going programme of training for staff at all levels working in archives, records management and information services in the UK. They developed a Training the Trainer course for the National Archives of Estonia and Latvia: this resource pack is based on the training materials used for that training, coupled with their experience of delivering a wide variety of archives and records management training over the past two decades.

How to use this Resource Pack

There are many ways to use this pack. Individual learners can use it as a book and read it through from start to finish. It may be more useful to approach it in a more targeted way and focus on training techniques that may need improvement or represent methods that are

perhaps new. Click-throughs within the Web-based version allow learners to navigate to supporting material and areas of follow-up interest.

The pack can also be used as the basis of a training programme for training trainers. If the user follows the guidance in the pack on organising training, it is possible to select an appropriate programme from the list of contents.

Comments on the Pack

The ICA Section on Archival Education and Training Steering Committee invited peer review in the spring of 2005 and many comments have been incorporated into this first edition. SAE continues to welcome feedback on the pack.

Planning a course

Establishing the training need

Essential to the success of a training event is that the training offered is actually required. It is all too easy to assume that there is a training need just because you want to organise a particular training event. You must first consult your potential audience. If training is to be a useful experience it should be meeting a definite need on the part of the commissioning organisation and/or the potential participants. However, it should be noted that there can be a significant difference between what a group / agency thinks it needs and what it actually needs both in level and nature of training. It should also be clear that training is the appropriate response to what is required. Otherwise you will be faced with either a group uninterested in the training or no participants at all.

Before you begin planning the training find out what training is needed and what those involved will want. If training is being commissioned have a thorough discussion with the commissioning organisation to establish that the focus and content of the training will meet the requirement. If you are planning your own training event ask colleagues and your potential participants what they want. Depending on the type of training you are considering, the consultation can range from full-scale market research including interviews and questionnaires to informal chats at professional meetings. The former would be suitable for a major training programme such as a distance learning course. Sometimes you can only assess the training need by drafting a training event programme, advertising it and seeing what response you receive.

It is important to remember that training is not only for those without any experience or expertise in the training area. It can also be aimed at established practitioners who need to update their knowledge and skills, for example when new standards or legislation have been introduced.

Checklist to assist in assessing and planning the training

- Is training needed?
- In what subject areas is training required?

- What does the employing organisation want?
- What do the potential trainees want?
- What type of event will best meet the need?
- What method of delivery is best suited to the event?
- How long will the training take?
- How long will it take to organise?
- What facilities and materials will the trainer need?

Logistics

To develop successful training courses you need a combination of skills and expertise. Good logistical planning is one of the most crucial aspects of training delivery. If your participants are not comfortable physically and at ease psychologically, they will not benefit fully from the training content. The first step in planning logistics for training is to develop a timetable. Set out what needs to happen by what date and assign responsibility for each task. Remember that there will always be occasions when you have little or no control over some or all of the logistics, in which case it is best to be flexible and work with your participants to make the best of the situation.

Sample checklist

- Setting date for training
- Specification of equipment needed
- Identification of suitable venue
- Booking of venue
- Inviting speakers, including deadlines for handouts, summaries etc.
- Confirming speakers
- Draft programme
- Advertising
- Registration of participants
- Confirmation to participants
- Catering requirements and orders
- Copying of handouts and other training material
- Development of evaluation form
- Production of certificates

Venues and classrooms

One of the most important factors in successful training is the venue or room in which the training is conducted. It is vital to choose your training venue well and, especially if you do not have much choice, to get the most out of the space you are working in. If there is no possibility of checking the venue in person beforehand, it is advisable to get to the venue early on the day of the training to sort out any problems.

Do not be afraid to reorganise furniture, open or shut windows and doors as necessary to ensure that participants are comfortable. If they are too hot or too cold, can hear outside noise, are sitting on hard chairs or chairs that are too soft their concentration may not be good.

Questions to ask

1. How many rooms will you need?

2. Do you need break out or syndicate rooms for small group work and discussions?

3. What size should the rooms be?

4. What is the furniture like — do participants have somewhere to rest to write? Are the chairs comfortable?

5. What is the best way to arrange the furniture — lecture style, around a large table, a circle of chairs?

Factors which affect the participants' comfort

- Light — natural or artificial
- Fresh air
- Outside noise levels
- Acoustics in the training room
- Temperature

Training equipment

When planning training you need to make sure that you and your guest speakers have the necessary equipment to support your presentations. Check with the venue before booking and make sure that you have put your equipment requirements in writing.

Even if you have planned well and the venue is a reliable one, equipment can go wrong and let you down. Well in advance of the training day you should make sure your files are compatible with the hardware and software at the venue. Computer equipment is particularly prone to performance failure, so you need to check early on the day itself that the equipment works. It is a good idea to make sure you can reach a technician quickly to help solve any technical difficulties. It is important to have a back-up plan and to take along extra materials. If you have handouts you can speak to a handout instead of the OHPs. If the data projector equipment is not working, back-up overheads can be vital. If you are planning a video presentation you may need to talk through the programme and draw out the lesson that way.

Equipment checklist

- **Overhead projector and acetate slides**
  This is the most common machine for supporting visual aids to lectures and presentations. It uses mirrors, light and magnifying glass to project an image on a screen or wall. The slides used to carry the image are clear acetate and can either be hand written/drawn, printed from a computer or photocopied. The disadvantage of overhead slides is that they are expensive to produce and cannot be revised without creating a new slide. They can be more original and visually interesting than

PowerPoint presentations. Overhead projectors are more reliable and common than computers in developing countries and organisations with fewer resources.

- **Flipchart**
  Flipcharts are similar to white boards in that the presenter can write on them in a spontaneous way to support the presentation. They can also be used for material that has been prepared in advance. It can be useful to give sheets of flipchart paper to break-out groups for their feedback sessions. As with whiteboards, you need to make sure you have special flipchart pens (which are different from those used for writing on whiteboards).

- **Whiteboard**
  This is the modern equivalent of a blackboard, having a smooth shiny surface that can be written on and wiped clean. You will need to ensure you have several special whiteboard pens as they are designed to wipe off easily. You'll also want to make sure they are not running out.

- **Video visualizer**
  This is a piece of equipment which acts like an overhead projector but can project images of anything placed in its view. It is possible to use conventional acetates, but you can use paper print-outs, magazine illustrations, objects etc. This is a very flexible option to support presentations but it can be hard to focus the equipment. It is very expensive (over $1,000) and requires additional computer equipment including a data projector to work.

- **Data projector and computer set-up for PowerPoint or other presentation software**
  PowerPoint is a Microsoft computer programme which allows you to organise text in brief bullets and illustrations as a support to your presentation. Its advantage is that it is easier and cheaper to revise than overhead slides but, if not used well, it can be visually boring.

- **Projection screen**
  This is an essential piece of equipment for all of the visual aid machines mentioned above. The screen can be mounted on the wall like a roller blind or it can be free-standing. Whilst it is possible to use an even white wall for projection, a screen will ensure a clear and even image.

- **Video cassette player (VCR)**
  There are several ways of playing videos in a classroom. The first is with a large television and a conventional video player. This usually requires some reorganisation of the classroom to ensure all participants can see well. The other way to screen a video is with computer equipment via a data projector.

- **DVD player**
  Like a video player but uses digital technology (Digital Versatile Disks) to record and play films etc.

- **Internet link**
  If you are going to do any presentation involving viewing Websites, an Internet link (usually via a telephone) is required.

Breaks and catering

Scheduling and timing breaks and making sure that the catering and other facilities are adequate is essential for successful training. Whilst it is possible to serve lunch in the training room, it is usually better to have lunch in a different space — particularly as delivery of the

food and crockery can be distracting and if the remains are not promptly cleared away, this can add unpleasant odours to the training room.

Choice of food can also be very important to the participants'experience. You will need to assess in some way (perhaps with a tick box on the application form) whether there are any special dietary needs. You may want to select some vegetarian food as a matter of course but if you have participants that require kosher, vegan or glutan-free food you will want to cater for them too. There are some other important choices to make about catering.

Questions to ask
1. Do you want a formal sit-down meal?

2. Do you want a buffet meal?

3. Will you serve alcohol?

4. Will the food be hot or cold?

5. Will the food be light or heavy?

6. When do you want tea and coffee served — in particular do you want tea and coffee as people arrive?

You will need to work out where the men's and women's toilets are and let the class know at the beginning of the course. Similarly, you should tell them where they may smoke in the breaks. It is also good practice to tell the class where the fire escapes are and the drill in the event of an emergency such as fire including the assembly point.

Aims, objectives and learning outcomes

Introduction

Aims, objectives and learning outcomes provide a clear indication of the goals and purpose of the training. Trainers use them to focus the training and to assess performance and success of participants. Participants can use them to evaluate the training from their own perspective.

Aims are overall statements of what you hope the training event will achieve. For example:

"The aim of this training is to give an introduction to archives, records management and preservation."

Objectives are more specific statements of what you will present to the participants, for example:

"To present current methods of cataloguing and providing access to records."

Learning outcomes are a set of statements setting out what the participants should be able to do or understand by the end of the training event. For example:

"By the end of this course you will be able to use the International Standard on Archive Description to create descriptions of archive material."

We develop and use all three of these so that learners are clear about what the aims of the training are and what they will have learned by the end of it. They can also be used to feed into learners' evaluation of the training. Response to questions gauging levels of achievement of aims, objectives and learning outcomes can provide useful information on the success of the training.

Writing aims and objectives is fairly straightforward. Keep your language clear and try not to have too many little aims and objectives. Learning outcomes need to be more detailed. They also need to be more carefully crafted to ensure that the outcome as stated is achievable in the context of the training you are developing.

Writing learning outcomes

Learning outcomes can be difficult to write well. It is good to begin with a statement addressed directly to the participant, such as:

"When you have completed this course you should be able to:"

Tips for writing learning outcomes

Learning outcomes must be:

- Be clear and precise
- Be learner-centred
- Specify an outcome that can be observed or measured
- Be realistic and achievable

Use words describing activities which can be observed such as:

- State
- Describe
- Explain
- Identify
- Analyse
- Compare
- Demonstrate
- Plan
- Develop
- Use

Avoid words such as:

- Appreciate

- Know
- Be aware of

An example of learning aims, objectives and outcomes

Here is an example of a set of aims, objectives and outcomes for some training in providing reference and user services (also known as access to archives).

Provision of reference and user services

Aim

To provide a framework for developing and delivering reference and user services in a variety of record-keeping environments.

Objectives

- To discuss professional issues relating to the provision of reference and user services
- To examine the different sectors of users and their differing needs
- To review the range of services which may be provided
- To establish the means of providing them effectively in the workplace
- To consider the possibilities for developing user services and the awareness of them

Learning outcomes

On completion of this course you will be able to:

1. Explain the professional issues relevant to the provision of reference and user services
2. Describe and evaluate local policy on provision of reference and user services
3. Distinguish between the different types of users
4. Identify the service needs of different types of users
5. Identify the appropriate reference and user services for your workplace
6. Demonstrate effective responses to a variety of research requests
7. Explain the procedures for providing secure access to records and archives
8. Describe the essential attributes of a searchroom
9. Explain the functions of searchroom personnel
10. Describe the searchroom finding aids
11. Demonstrate effective use of the different finding aids
12. Explain the issues relevant to providing copies of documents
13. Describe the procedures for providing surrogate copies and a reprography service

Content design

Once you have established a need for training and undertaken research and analysis to profile your learners, you need to plan the course content. This usually needs to be undertaken in conjunction with the logistical planning and budgeting as these three areas are inter-related and have an impact on each other.

The first task is to identify the main subject areas that need to be covered. Remember to take into consideration the existing level of knowledge of your participants. Begin with the broad areas that need to be included and refine down into development of detailed sections or sessions.

Remember to take into account the learning outcomes, although sometimes these will develop along with the course, depending on how it has been commissioned or market researched. You also need to consider the participants and what they may perceive as important or less important content. Another consideration that affects course design is the time available for the training.

If you are using "external" speakers you will need to balance knowledge and expertise against teaching skills. Not all practitioners are good speakers. Sometimes the the person is more suitable for a good workshop than a lecture that might not be so well-organised or presented.

In designing the course, draw on your experience of what skills, techniques and knowledge practitioners in the field need to have at every level. Begin with the length of the course and think about the aims and objectives, even the broad learning outcomes to identify the main elements you want the course to include. For example, the aims, objectives and learning outcomes for a training course on the provision of reference and user services might be used as a guide to break the main elements into:

- Context and reason for reference services
- The range of different types of reference services
- Delivery methods
- Reference service users and non-users
- Policy and procedures
- Practical aspects to provision of user/reference services
- "Customer management"

Once you have your basic list of main areas, you can begin to map out each one in more detail, but it is best to start to think about timings at this point as well. It can be helpful to tabulate this as follows:

Main subject area	Points to cover	Delivery method	Time required	Teaching aids etc
Different types of reference services	Face-to-face Written via mail Written via email Telephone Resources needed	Group brainstorm	20 minutes	Flip chart or whiteboard to record results
Policy and	Access policies	Presentation and	1 hour 20	OHPs or powerpoint

procedures for reference services	content and style	workshop (form design)	minutes	and workshop space and resources
	Reading room regulations			
	Document request procedures			
	Security issues			

You obviously need enough time to cover the subject matter for each session — and that may vary so don't feel all sessions have to be of equal length. However, if you really don't have enough time to cover everything as thoroughly as possible, you might adjust the level of detail and/or choose a delivery method that allows you to point at sources and examples that the participants can explore for themselves after the training is finished. Choosing delivery methods in any case is very important. You will want to have a mix of lectures, presentations and more participative sessions such as workshops and discussions, but you need to think carefully about which delivery suits which subject matter the best.

When designing the training content and programme you also need to take resources, equipment and venue into consideration. Think about the following:

- Is there space for break-out groups?
- Will meals be served in a separate room? If so you can get away with a shorter break but if not you should leave some time for participants to go out for a breath of air and a change of scene.
- Is there a data projector and/or OHP equipment?
- What kind of chair and table layout is possible and how will this affect group dynamics?

Finally you should draw up your programme. Don't forget to allow time for a midday meal and refreshment breaks mid-morning and mid-afternoon. You also want an introductory session at the very beginning so you can introduce yourself to the class and go over the programme and the learning outcomes, and so participants can introduce themselves too. It can also be very helpful to go over basic terminology so that everyone has the same understanding of what the technical terms mean. At the end of the day you should allow time for final questions, a quick participant evaluation form and certificates, if you give them out.

Budgeting and resources

Whether you are running training programmes as a commercial enterprise or as part of an outreach or grant-funded project, it is important to budget carefully. Training does not need to have a huge budget but there are some basic costs associated with training provision and training cannot be delivered without certain resources regardless of whether the training is commercial or not for profit.

A basic checklist of expenses associated with training is given below:

- Venue hire
- Hire of equipment (eg flip chart stand with use of pens and paper, overhead projector, projection screen, A-V equipment, computer equipment)
- Stationery and postage (correspondence with participants, advertising, etc.)
- Speakers' expenses
- Speakers' fees
- Advertising
- Catering (refreshements and meals)
- Handouts/handbooks

Additional expenses might include:

- OHP slides (these work out very expensive over time)
- Floppy disks or other digital media
- Your own travel expenses for administration, e.g. to collect handouts from the printers
- Paper to print out handouts
- File covers, pens etc for use in training room
- Translation/interpretation fees

Some of your expenses will be finite quantities, that is, the cost of hiring a venue and equipment will be the same regardless of the size of the class. The table below gives an example of the total finite expenses for a training day.

Finite expenses for Archives Training Day

Item	Cost
Venue	£100
Equipment	£20
Speakers expenses	£65
Speakers fees (2 x £100)	£200
Stationery & postage	£15
Advert in professional Newsletter	£50
Total	**£450.00**

Other expenses, such as catering, will be dependent on the number of participants. The following table gives an example of the participant numbers dependent expenses:

Participant Numbers Dependent Expenses for Archives Training Day

Item	Cost
Handouts	£5 each
Catering	£7 each
Total cost per head	**£12**

You need to use these two cost estimates to establish your overall budget. If your organisation is offering free training, you will need to make sure you have the budget, or put together a budget proposal. In the example given, if you were going to offer training to a class of 20 participants, the overall budget of £731 would break down like this:

Overall Budget for Archives Training Day

Item	Cost
Venue	£100

Equipment	£20
Speakers' expenses	£65
Speakers' fees (2 x £100)	£200
Stationery & postage	£15
Advert in professional Newsletter	£50
Handouts (24 @ £5 each*)	£120
Catering (23 @ £7 each†)	£161
Total	**£731.00**

* You need to allow a copy for the file and a working copy for yourself as well as a copy for each of your speakers
†Similarly you need to provide catering for yourself and your speakers

If you are running training on a business footing, you will need to work out what profit you need to make to justify your preparation time and the time you spend on the training day itself. You then need to work out what you need to charge each participant and the minimum number of participants you need in order to break even.

If we take the budget given above, we can see that the cost for delivering our example Archives Training Day to 20 participants is £731. Perhaps you would hope to make £1500 profit to cover your time. Therefore you need to make £2231 on your training — divide that by 20 and you need to charge participants £112 each. However, if you don't manage to attract 20 participants, you need to decide what your break-even number is and at what point you will decide to cancel the training. Obviously you could run the training if you had 8 people attend and charged around £100 each. You might decide you would be happy with £500 and then your break-even would be 13 participants.

Profiling learners

For training to be effective it is important to have a clear idea of who will be attending or taking your course. If possible you will want to profile them to ensure that your course is fit for purpose. How much do you know about them? Is there a typical participant or will they all be very different? This will not usually be at an individual level: what you are trying to do is get an overview of the potential group as a whole to ensure the training you are planning is appropriate for them. This will help you to organise the training content and also prepare you, and your co-trainers, to deliver the training at the right level for your audience. You may not have direct contact with potential participants prior to the training and may need to rely on information from the commissioning organisation. In either case this section provides the main questions to ask.

Basic questions

The following basic questions may need to be considered, however you will want to select the most relevant questions according to the type of course you are planning.

How many participants should you have?

Be realistic about how many, or few, participants will make an effective training audience. If you are planning to include interactive sessions, such as workshops or break out groups, you will want to limit the number of participants to between 20 and 25, otherwise the sessions will become unwieldy and too time-consuming. Conversely too few participants, usually less than eight, can result in an unsatisfactory training environment.

Who are the participants?

Factors such as age range and gender mix, as well as participants' cultural, social and ethnic background affect the training delivery. Similarly the level of expertise of the participants and their position in life and employment will be relevant. Also there may be financial considerations which may affect their ability to attend the training.

Where are the participants from?

This applies not only to their place of employment, what type of organisation it is and their position in the workplace, but also to geographical location. Long journeys to the training venue may mean that participants will tire earlier in the day, also the start and end times for the training may need to take travel requirements into account. Again there may be a financial implication with travel costs which will deter participants.

What is their experience of training?

Some people will be used to introducing themselves, participating in group work and class discussions. For others this will be completely unfamiliar and they will need explanation and reassurance.

What is their experience of the training topic?

As mentioned above training is not always a matter of introducing participants to new ideas and concepts. It can be updating experienced personnel or providing the professional theoretical basis for practical work that participants having been carrying out for many years. Again, the level of participants' experience will influence training design and methods of delivery.

What is their motivation?

You will need to consider what the benefits of the training will be to the participants both personally and in the workplace. You may also want to specify who the course is intended for. A good way to be clear about whether the course will be appropriate for intended participants is to define the **aims and objectives** of the training as a series of bullet points.

Participant profiling tables

The following tables provide more detail for profiling participants taking into account demographic, professional, motivation, learning and resource factors. You can use all or parts of tables to make a profile of your potential participants by thinking about the questions in column 1, Factors, adding any others you think are relevant. Put your answers in column 2,

Profile. Then draw up a list of the implications to keep in mind when developing your course and the course materials.

Alternatively, you can use the tables as a basis to develop a less formal or less scientific tool to gather useful information about the participants in advance. Distributing such forms to the class will provide you with useful background to guide your preparation at any stage prior to training delivery.

Participant profiling table: Demographic factors		
Demographic factors	**Profile**	**Implications**
Number of participants		
Where do they live?		
Age		
Gender		
Personal circumstances		

Participant profiling table: Professional factors		
Professional factors	**Profile**	**Implications**
Employing organisation		
Roles and responsibilities of participants		
Professional knowledge, skills & experience		
Length of employment		
Employers' training needs		
Participants' training needs		
Participants' knowledge of training topic		

Participant profiling table: Motivation factors		
Motivation factors	**Profile**	**Implications**
What personal benefits will participants get from taking the course?		
What benefits will they get in their workplace?		
What are their expectations?		

Participant profiling table: Motivation factors		
Motivation factors	**Profile**	**Implications**
What might prevent them from taking the course?		

Participant profiling table: Learning factors		
Learning factors	**Profile**	**Implications**
General education		
Professional education and training		
Experience of learning and training		
Confidence about learning		

Participant profiling table: Resource factors		
Resource factors	**Profile**	**Implications**
Who will pay course fees and expenses?		
Will participants be given time away from their work to attend training?		

Participant profiling table: Other factors		
Other factors	**Profile**	**Implications**

Methods of delivery

Selection

There are many different delivery methods to choose from. Some of these affect the entire style of your training. For example, the first choice is between face-to-face delivery and distance learning. This Pack assumes that the choice for some type of face-to-face training has been made — although we do address the basics of distance learning elsewhere in the pack. Obviously the techniques and even the content of your training are fundamentally

affected by this initial decision. The information you have gathered whilst profiling your learners will be very useful at this stage of training planning.

Once the decision has been made to provide face-to-face training there are several other questions to ask, such as:

- Will the training be entirely classroom based and involve the trainer constantly interacting with the participants?
- Will there be time away from the classroom when the participants will pursue studies on their own?
- Is the trainer going to be very active in providing material and direction?
- Will the trainer set specific tasks for individuals and groups?

Where the trainer is going to be very involved, providing materials, direction and structure, the training will be more traditional in nature. If the trainer is going to act more as a facilitator allowing the individual or group to set their own goals, choose their own content and work at their own pace, the training is more likely to follow an individual or facilitative model.

Within any overall training method, there will be many different options for delivery of specific content sessions. It is most effective to vary delivery of content in any given course. This helps to keep the participants interested, particularly if interactive delivery styles are chosen. Some delivery methods will assist you as trainer in assessing whether the course learning goals are being met. The variety will also keep you fresh and allow you to pace yourself throughout the course. The delivery options for specific sessions given in this Pack include (but are not exhaustive):

- Lectures and presentations
- Other class activities
- Coursework
- Case studies

When deciding what method and type of training is best for your participants' needs, you should consider:

- The number of learners
- What content is to be delivered
- How much time is available to deliver the course
- How often the materials will be delivered
- How many trainers there are
- The educational environment
- What funding is available
- The corporate culture
- What other resources are required

Developing and using case studies

Introduction

Case studies are descriptions of a real life experience, related to the field of study or training, which are used to make points, raise issues or otherwise enhance the participants' understanding and learning experience. The account usually follows a realistic scenario, such as a management or technical problem, from start to finish. Because they provide practical examples of problems and solutions, challenges and strategies, they support more theoretical material and often make the "lesson" more memorable and believable for the class.

As Laura Millar notes in *Writing Case Studies: A Manual* (part of the *Managing Public Sector Records Training Programme* materials published in 1999 by the ICA and IRMT), case studies are particularly useful in the archives and records management field as there is so much variety in the full range of archives and records management programmes with many different types of organisations as well as local, national, and regional differences.

How to develop and write case studies

There are no definite rules about developing case studies. The initial choice of subject will depend on serendipity — a practitioner will have had an experience which provides a good example of a situation which illustrates something the teacher wants the class to learn. Case studies can of course be fictional in detail whilst still based on a practitioner's experience and knowledge. Fictitious case studies are appropriate if the real example is not rounded enough or there is some reason for keeping organisations and individuals confidential. It is also possible to write a single case study, for example about developing a project plan, which incorporates examples of documentation and action from several different projects in various organisations.

The case study may include some or all of the following:

- Setting the scene
  - details of the organisation
  - description of the players
  - outline of the particular challenge or problem
  - any additional information necessary to understand the scenario
- Resources available
- Identification of complexities or issues in the work environment affecting the project
- Account of how the problem was solved, including
  - personnel / stakeholders
  - planning phase
  - options considered
  - implementation
  - outcomes
- Examples of documentation such as project plans, budgets, memos, data gathered
- Analysis of project and its success/failure

Depending on how the trainer intends to use the case study, it may or may not provide the solution or answers to the problems posed.

How can case studies be used for training and education

There are two aspects to the use of case studies in the classroom or training room: how they can be presented to the participants and what the desired learning outcomes are for the participants.

Learning outcomes

Case studies are a substitute for student placements in the workplace if the course of study cannot allow for this. For this reason, they are particularly useful in a short training course. They also provide realistic simulations of the kinds of real life experiences students can expect when they practice for themselves. For students who are pursuing on-the-job training, case studies can offer alternative experiences, approaches and solutions which will broaden the students' knowledge and skills.

In reading or listening to case studies and thinking about the scenario and possible solutions, students develop skills which they will need to pursue their careers. The skill set includes:

- identification of the problem or challenge
- understanding and interpreting data
- analysing information
- recognising assumptions and inferences
- thinking analytically and critically
- exercising judgement
- taking and defending decisions
- understanding interpersonal relationships
- communicating ideas and opinions

Presentation and use

There are many different ways to use case studies. How they are used will depend on the length of the course, the subject matter and upon the delivery style of the trainer.

In a short training course a presentation by the author, perhaps with supporting visual aids, is a really good way of providing practical examples of the theory or techniques that are being covered. The presentation can be followed by questions and answers to give the class a chance to clarify and enhance understanding. This might be a free-for-all or more carefully structured with the presenter asking questions designed to focus participants on particular aspects of the problem evoked in the case. In a longer course it might be possible to get the class to read through the case study for themselves before participating in discussion.

Case studies can be very effective when they are used comparatively. In this approach the case studies might be presented to or read by the class. This would be followed, once everyone was familiar with the cases, by general discussion, discussion focused by the trainer, group work or even worksheets prepared by the trainer. Again, the object of the follow-up discussion or group work is to help the students to appreciate the challenges inherent in the scenario and think through the various ways of approaching and solving them.

Another possibility is to provide the class with only part of the case study and to get members of the class to act out a scenario. For example, a meeting where the archivist or records manager had to convince other stakeholders of the need for a course of action or provision of funding. The students should be asked to present the individual concerns and point of view of

the various protagonists. A variation on this approach is to give some of the details to the class and get them to ask questions to get the full picture.

Case studies can provide the basis of individual or group assignments. The student or group of students is given a case study and asked to write an analysis and any recommendations that seem appropriate. If the students need help in getting started, a SWOT analysis can be very effective — the trainer can provide a list of questions around the four elements (Strengths, Weaknesses, Opportunities, and Threats), or the students can use the schema as a basis for their own analysis.

In longer training courses it can be very effective to get students to develop their own case studies. This allows students to apply their learning, try out their newly gained skills, learn some more and demonstrate what they have learned. By, in effect in writing their own case, students can:

- show that they are able to apply theory to realistic situations
- prove they can identify problems and challenges
- demonstrate their ability to review facts, assess stakeholder relationships and analyse the "big picture"
- exercise their analytical, strategic, and problem solving skills
- offer a choice of options to approach a task or solve a problem

Further reading

There are four publications in the *Managing Public Sector Records Training Programme* series which are particularly relevant to case study development and use in the archives and records management sector. Details are as follows:

- *Writing Case Studies: A Manual*, Laura Millar (ICA/IRMT, 1999)
  This slim but invaluable volume gives advice on how to write case studies, what kinds of learning outcomes case studies can encourage and how to use case studies effectively.
- *The Management of Public Sector Records: Case Studies*, Volumes 1–3 (ICA/IRMT, 1999)
  These three volumes contain 34 case studies written by practitioners and educators from all over the world. Most of the cases include notes for trainers on how to use the case studies.

These publications are available in Word or Adobe Acrobat (PDF) format from the IRMT Website, **http://www.irmt.org**.

Coursework

Coursework is a piece of work set for participants to be completed during the time the training takes place. It can be a fairly substantial piece of work and if formal marks or grades are being given, it will count towards the final results. If the training course is fairly short, the coursework should be a shorter piece of work. If the training course is longer, it is possible to

set more detailed and challenging coursework. Of course, it may not be appropriate to set coursework at all.

Setting coursework

When setting coursework it is important to be very clear about what participants are expected to do. It is a good idea to provide them with written instructions which include:

- Learning outcomes or rationale behind the coursework
- A clear outline of what the participants should do, including methods and how they should deliver the coursework (eg an essay, a presentation)
- Details of any resources, such as texts or on-line sources, that are useful or necessary to complete the assignment
- Timetable giving milestones and final delivery date
- Scheme for marking or other feedback

It is a good idea to check with everyone in the class at some point during the course to make sure they understand what they have to do and are making progress.

Examples of coursework

There are many different approaches to setting coursework. Here are some examples to illustrate the methodology.

Action plans

One of the most effective types of training coursework is an action plan. This involves the participants selecting a topic or project that they have been addressing at work - or plan to tackle in the near future. The project should be related to the topics covered in the training course. Participants are asked to research the problem and come up with an action plan that they could implement when they get back to the office. The coursework can be delivered as a written piece but in a shorter course the best way to see what participants have done is to get them to produce a short presentation for the rest of the class.

This coursework will require the participants having access to a library of material or at least the internet. Time can be alloted in the training course programme or it can be "homework" for participants.

Essays

Most people are familiar with writing essays from their schooldays. However, many people are not comfortable producing long texts of a theoretical nature so essays need to be used carefully in the context of training. When setting essays as coursework it is very important to be clear about the kind of information and detail you are seeking to get from the participants. You will also need to think about how you are going to mark the essays so that you assess each individual's work according to the same criteria. In the context of archives and records management, essay writing is not as important a skill as writing reports and procedures so it can be better to focus coursework on work assignments of the kind described below.

Reading and comprehension

A good option for coursework is to set some reading. The class can all have the same reading or different groups or individuals can have different texts. You can also set more than one text if comparison or a fuller picture of the topic is required. It can be helpful to set some questions for the participants to consider while reading or to answer more formally when they have finished. The coursework can be delivered as written answers to the questions or as a group presentation or class discussion.

Desk research

Desk research is where the class is set an assignment to investigate a topic or issue. They may be given some leads or they may be expected to base their investigations on reading lists or presentations given during the course. This kind of coursework could be very tightly focused with a "right answer" or it can be more general and used to develop the participants' own interests or research skills. These are very valuable skills for archivists and records managers so coursework like this is particularly effective.

Work assignments

Where the training is very practical and delivered primarily to participants who are in the workplace, the most effective coursework emulates the types of documentation that is required at work. The subject matter might focus on one or more of the topics covered in the training but the delivery of the coursework is in the form of a report to management, a presentation to colleagues, a specification for a software company or other workplace product.

Giving feedback on coursework

It is very important to give feedback on coursework. Participants will have taken their assignments very seriously and will expect some indication of the quality of their work — even if the course is not formally evaluated. Here are some ways of structuring your feedback to participants:

- If the participant is delivering the coursework as a presentation pay close attention to the content of their piece. It can be good to map out in advance what you might expect to be present in the presentation (often you will be able to use the written instructions for the coursework as a basis for this). Your feedback can be written but for presentations it is good just to do it verbally then and there. Detail for the participant where they have covered things well and where they have left things out. If the work involves problem solving or lateral thinking, analyse not just the solution offered but the process or methodology involved and mention that briefly in your feedback. Comment also on style of delivery as appropriate.
- With more formal coursework that counts towards overall grades and marks it is important to develop a marking scheme. Think about what knowledge or expertise you want the participant to demonstrate. Make a list to check off the important points that have to be present as evidence that the student has grasped the subject. Work out what embellishments or aspects of the work might lift it out of average to good or excellent. This kind of coursework may well require a second marker.

When giving feedback it is important to develop a style which is honest, critical but positive and encouraging. If you are not able to identify and point up weaknesses as well as strengths, the participants will not learn from their own mistakes, one of the most effective ways of learning. On the other hand if you seem to be too critical and harsh, participants may become discouraged.

Distance learning

What is distance learning?

Distance learning (also referred to as distance education) is training delivered to students or participants who do not gather together regularly in the same place to receive it in person from the trainer. Essentially detailed materials and instructions are sent or made available to students who carry out tasks which are in turn evaluated by the trainer. In fact the teacher and learners may be separated not only geographically but also in time.

Why is distance learning used?

Distance learning allows students to take classes whenever and where ever they are. It allows them to fit their learning and education around other responsibilities and commitments such as family and work. It also gives students, who would not otherwise be able to learn because of time, distance or financial difficulties, the opportunity to participate. It also has the potential to make less commonly taught subjects available to more learners.

Pros and cons of distance learning

Distance learning can be very effective, especially for more mature learners who have strong motives for wanting to succeed and are happy to be in charge of their own learning. However, successful Distance Learning packages, cutting out the relentless timetable of face-to-face learning are nonetheless not an easy option for either learner or trainer. Here are some of the pros and cons:

Advantages	Disadvantages
• Easy logistics — all you need is good communications • Lack of overheads such as classroom and teaching staff • Students are in control of when they learn and at what pace • It can be more affordable/possible because students can fit study around work	• Time and work associated with delivering distance learning exceeds that of face-to-face training • Administrative support for distance learning may need to cater to greater number of students • Some students find learning at a distance isolating • The lack of structure and need for high level of motivation/initiative can be challenging for students

How is distance learning delivered?

Distance learning can be delivered using a variety of techniques and technologies. E-learning is probably the most expensive and cutting edge form of distance learning but there are other ways of delivering training at a distance that have been used successfully for many years. Methods of delivery include:

- **E-learning**: delivered using computers utilising internet technology and programming which allows the student to interact with the learning materials via chat rooms, notice boards, video conferencing, etc. Some examples of this can be found at: http://www.archive-skills.com/links/links10.php
- **Television programming**: involves a series of television programmes which are designed to convey the techniques and theory. These could be broadcast via cable or terrestrial channels or provided on video tape or DVD. For many years the Open University in the UK used this technique.
- **Written materials**: sometimes called correspondence courses, this is textual matter written specifically for the distance learning course, for example a workbook involving exercises and tasks, which the participants work through at their own speed.

What is different about distance learning?

Distance learning requires a different approach in terms of course planning, design, delivery and communications. Learners will need to be self-motivated to begin with and to develop persistence and skills in self-directing work. Trainers and teachers will develop and use new training methodologies and styles, departing from straight instruction to managing learning strategies, supporting students, facilitating debate at a distance and disseminating information and views. Some of the elements of facilitated and individual learning are present in distance learning.

How to write distance learning materials

When developing textual materials for Distance Learning it is important that they are written in a way that engages the learner. Some tips are:

- Keep your writing simple, direct and clear
- Provide definitions for any new words or terminology used
- Use an informal and accessible style
- Provide clear learning outcomes for each unit/module
- Map a path for the learner in your introduction with learning outcomes so they know where they are and where they are going
- Repeat concepts, ideas and theories several times if possible
- Intersperse activities and self assessment exercises all the way through with something more significant at the end.
- Build up knowledge and understanding over several exercises
- Use relevant examples and case studies wherever possible

Success factors

There are some critical success factors for distance learning:

1. The trainer needs to be enthusiastic and committed
2. The team should include good administrative support and, depending in the type of materials and delivery methods used, a good design and production staff
3. The teaching materials must be properly planned so they are tested and ready in time. Most of the work occurs before the material reaches the students
4. There must be facilitation and encouragement of learner interaction with both trainer and other learners
5. The trainer needs to keep in regular contact with all the students
6. Competent use of any technology used is a prerequisite. It should be fully tested and explained to the students so they are familiar and comfortable with it
7. Communication and technical problems should be dealt with as they arise
8. Trainers need to use a variety of methods for interaction and feedback (eg one-on-one and conference calls, snail-mails, e-mail, video and computer conferencing)
9. Students could keep a diary of their views on progress and course content which they submit or share in some way at frequent intervals
10. It is crucial to have a residential course at least once, preferably at the beginning to help learners settle into the distance learning routine and to give some direction on study techniques

Class activities

Class activities break up the programme and help to retain class concentration and interest. They can also reinforce learning or substitute lectures or presentations as a way to get content information across.

Types of activity

There are many different kinds of activity that work well in training. Some examples are also given in the section, Selection. The list below is not intended to be exhaustive and as your training skills develop you will begin to find inspiration in your own professional development experience, reading material and even general leisure activity which can be turned into an interesting or useful classroom activity.

1. **Introductions and ice-breakers:** used at the beginning of the course, before the specific subject matter begins, to get the class involved in the training. It is particularly valuable where the trainer has had little information about the participants beforehand or the participants themselves have come from different organisations and do not know each other. Introductions can be short and simple or involve participants giving detailed information about their background and learning goals or even introducing their neighbour (after a short "interview"). An ice breaker is an activity where the class is encouraged to participate and begin to get to know each other and the trainer(s). This does not have to be a complex exercise and can be as simple as a group brainstorm to establish knowledge of basic principles or terminology that will be explored/used in the course.
2. **Individual work**: this is where each participant is given something to work on on their own, perhaps a quiz or a presentation based on their own experience or a piece

of research on a step or portion of a project or process that will feed into the work of the whole class.

3. **Group exercises**: these are exercises designed to get participants to work as a team. The subject matter may be more challenging than that for individual work, as the group can pool its knowledge, experience and problem-solving skills.

4. **Brainstorming sessions**: according to the "purists" brainstorming sessions have quite rigid rules such as permitting no detailed arguing or discussion and focusing on random and spontaneous thoughts stimulated by the group. In the classroom a more gentle form of brainstorming can be used to problem solve or to capitalise on existing knowledge to replace a lecture that just tells most participants what they already know.

5. **Facilitated discussion**: this is where the trainer leads a discussion on a given topic, keeping in mind a checklist of issues that should be covered.

6. **Workshops**: workshops are usually a more substantial piece of groupwork taking an appropriate amount of time, for example each group may be asked to map out part of a disaster plan. The group is given an issue to consider and discuss or a problem to solve and expected to develop the content or information required to complete the task.

Developing and setting class activities takes careful thought and preparation. Here are some tips:

- Work out what you want the class to do and whether they should do it individually or in groups
- Write an overhead or handout that explains what the class is to do and how
- Prepare any additional handouts they might need to do the task (eg reading matter)
- Be clear about the time allowed for work and the time needed for feedback.
- Remember to include writing time if the feedback is to involve mini presentations
- Be available to answer questions and circulate to each group / individual during the activity in case any individual or group needs help
- Give comments and feedback

Facilitated learning

What is facilitated learning?

Facilitated learning is where the students are encouraged to take more control of their learning process. The trainer's role becomes that of a facilitator and organiser providing resources and support to learners. In turn the participants learn with and from each other as they identify and implement solutions to challenges, problems or other developmental issues. They might also set their own objectives and be responsible for learning assessment.

The technique is used most frequently in university education and more formal study. It is probably not a methodology that trainers in the archive field will be able to use exclusively, but it offers some techniques and approaches that can be incorporated into training courses that run over several days. For example having participants work independently to develop an action plan, related to the course content but tailored to their needs.

In contrast to individual learning where the trainer becomes very involved and responsive to each participant's individual needs, with facilitated learning the trainer supports and facilitates the participants who develop and shape their own learning goals and achievements.

Advantages and disadvantages of facilitated learning

Facilitated learning is based on the premise that the more responsibility a student takes for his/her own learning, the more effective the training or education will be. The advantages are:

- Learners use skills like synthesis and analysis
- The learner is actively involved
- Learners interact with and learn from each other
- There is no need for large amounts of learning materials
- Learners can work in an environment similar to that of the real world
- A variety of learning methods are used

There are some disadvantages:

- Facilitated learning can be — or be seen to be — more expensive
- The pace of instruction is based on the group rather than the individual learner
- The teacher's role is not clearly defined
- There is a need for extra facilities to allow for group work etc
- The learning is relatively time consuming in proportion to the amount of material covered
- Facilitated learning is not appropriate in some cultural contexts

Delivery of facilitated learning

As already noted, the teacher's role in facilitated learning is to create and manage collaborative learning experiences, or group learning in which exchanges between instructors and learners and among learners occur over a period of time.

Facilitated courses and learning experiences usually take place over a series of weeks and may include:

- On-demand tutorials, presentations, and keynote addresses
- Online or face-to-face group discussions and exchanges
- Handouts, readings, and links to relevant Websites
- File and link sharing
- Surveys and polls
- Virtual real-time or physical classroom sessions, lectures, seminars
- Brainstorming sessions (virtual or face-to-face)
- Group activities such as role play and games
- Field trips
- Projects and case studies

Facilitated learning in its purist form is likely to occur in a well-resourced environment with participants who are highly motivated and pro-active. Most training environments are unlikely to be able to offer the necessary conditions. However, elements of facilitated

learning can be combined effectively with other styles of training to provide many of the benefits inherent in the methodology.

Individual learning

Individual learning is training that is individualised to take into consideration the differences between learners. It is most appropriately used in a one-to-one situation, such as training successors or team members in the workplace. Unlike facilitated learning where the trainer takes a more passive role, with individual learning the trainer needs to consider and cater for the needs of individual participants for example:

- Rates of learning and learning style
- Attitude
- Maturity
- Interests which effect the level of learning
- Motivation
- Learning environment

It doesn't necessarily mean learners are at home — they can be in a classroom and still work through things at their own pace.

The main types of individual learning are:

- Distance learning
- Resource-based learning
- Computer-based training
- Directed private study

The advantages are:

- Many learner differences can be taken into account
- Learners can work at their own pace at the time most convenient to them
- Different learning styles can be accommodated
- It is cost-effective for large number of learners
- Learners are more in control of how and what they learn
- It is active not passive learning

There are some disadvantages:

- There is a long lead time to prepare materials
- Learner motivation can be hard to maintain
- The trainer's role needs to change

This kind of training is probably most appropriate when the trainer is providing on-the-job training for one or a small number of colleagues. It is a good idea to link the training to practical exercises based on the working need — for example, planning a record survey, drawing up appraisal guidelines etc. It can also be very effective to provide this kind of training as a follow-up to face-to-face training.

Methods of delivery

Presentations and lectures

A lecture is delivered to a large number of learners by a teacher (usually in person, but can be by broadcast, video or film). A conventional lecture would be 50–55 minutes of uninterrupted discourse from the teacher with no discussion, the only learner activity being listening and note-taking. Lectures will not necessarily include visual aids. Presentations follow a similar pattern but are more likely to happen outside formal education for example in the workplace. Presentations might be shorter and would definitely include visual aids — possibly of a high-tech nature.

There are many advantages to using presentations and lectures as a delivery method for training. Although the disadvantages are fewer, it is important to acknowledge them and to take measures to minimise them as they are significant and can undermine the learning experience.

Advantages	Disadvantages
• Up-to-date info can be given quickly and simultaneously • Learners quickly get overview of subject • Learners can be stimulated by good lecturer • Familiar form of delivery • Cost-effective • Easy logistics • Lends itself to use of acknowledged expert in the field • Content can be controlled • Pace of delivery can be controlled	• Doesn't allow for different learning abilities or speeds • Passive • Time and location controlled by the teacher • Is often perceived as "boring" by learners

There has been a lot of research carried out on learning experiences which sheds light on the appropriateness and value of presentations and lectures as a delivery technique. When preparing your presentation it is good to bear in mind the following:

- The brain has an average attention span of 10 minutes unless the trainer does something to stimulate attention, e.g. ask a question, show a slide, change the pace
- When a message is given once, the brain remembers only 10 per cent a year later — when the message is repeated six times, recall rises to 90 per cent
- The brain is more likely to remember the beginning and end of events
- Recall is high when mnemonics or analogy is used
- Recall falls rapidly after 24 hours without review
- The brain prefers rounded diagrams and figures to square
- The brain prefers colour to black and white
- The brain remembers unusual things very well

Tips for delivering effective presentations and lectures

There are some people who are natural speakers. They can speak without preparation, without notes, without visual aids and put together a presentation on their chosen or accepted subject that will impress, inform and captivate their audience. In so doing they might violate all the tips and guidance offered in this section but they will nevertheless be gifted trainers. Most of us need to develop and practice our speaking and presentation skills and following the guidance below will assist in preparing and delivering an effective and professional presentation or lecture. Some of the tips will also be relevant to other kinds of delivery methods.

Introduction

- Say whether the learners may ask questions
- Tell them whether and when to take notes
- Tell them about the handouts
- Outline your presentation

Find out about your participants' existing knowledge

This is also a good way to "warm up" the class.

- Ask the class questions
- Give them a (brief) written test or quiz
- Find out what they have done before

Organise your information well

- Make sure you know enough about the subject to be able to respond to searching questions which are not part of your presentation
- Your lecture/presentation should have a beginning, a middle and an end or follow some other logical structure
- Remember you might need to re-orient your learners half way through
- Explain how the presentation fits into the overall training
- Relate your session to previous and subsequent elements of the training

Relate to learners

- Place subject in context
- Identify with something they will find useful
- Use analogies
- Use illustrations and diagrams to help clarity
- Use examples which will make the topic interesting for learners

Language

- Use plain and simple language
- Use words that the learners know
- Write up definitions for complex terms or provide a glossary handout

- Explain abbreviations
- Avoid jargon and unnecessary repetition (but remember to reinforce important points)

Body language

- Be sure to make eye contact with the class without focusing too much on any one individual
- Remember to smile and look confident
- Avoid excessive gesturing which can be distracting
- Find a comfortable posture so that you stand balanced and relaxed

Voice

- Use voice tone and pitch to avoid monotony
- Pace yourself slowly enough to be clear — you will need to speak much more slowly than your usual talking speed
- Pause to allow time for words to be digested

Clothing

- Wear clothes that make you feel confident and comfortable
- Aim to wear clothes that will not alienate your audience — if in doubt it is best to be smarter
- If "lucky" ties and ear-rings help boost your confidence, wear them
- Remember loud or inappropriate clothes can distract your audience

General tips

- Know your subject
- Keep to your time (practice delivering the presentation to be sure that the timing is right)
- Be honest — even if it means admitting you don't know the answer
- Be enthusiastic
- Be yourself

At the end

- Summarise content and/or review main points
- Refer to bibliography and further reading as appropriate
- Allow time for questions

Visual aids

The most common technique for making lectures and presentations more interesting and effective is the use of **visual aids**. Lecturing can be a boring and therefore ineffectual way of delivering learning. Visual aids are used in presentations and lectures to illustrate the subject, they can help to break up the monotony, providing a visual stimulant to reinforce what the learners are listening to. The most common forms of visual aids are:

- Overheads (also know as OHPs, slides or transparencies)
- Photographic slides
- Powerpoint presentations
- Objects, pictures or documentation which is handed around the class but which do not constitute a handout

More detail on developing effective visual aids is given in the Teaching aids section.

How are presenters and lecturers assessed by the audience?

Making presentations and delivering lectures can be a very daunting experience, particularly as most of us have been on the receiving end of speeches in the past. It can be helpful to remember how we might be judged or received by our audience. There are three main areas on which a speaker's competence may be judged:

1. Knowledge: technical competence and practical experience
2. Design and delivery: the "performance", including: voice control; eye contact; body language; audio-visual use and support; facilitating discussion; making learning fun
3. Enthusiasm: interest in the subject; listening skills; ability to answer questions

How to make lectures and presentations more interactive

Lectures can be the best way to get a lot of factual information over to a large group of people. However, they do not have to involve lengthy periods of monologue from the speaker as there are ways of breaking up the delivery to add variety and interest. Here are some suggestions:

- Interrupt the lecture with questions to the class
- String together a set of mini lectures and class activities
- Buzz groups — set a specific question and ask the learners to discuss it in pairs
- Provide partial handouts to be filled in by the class during the lecture
- Give the class a short piece of relevant reading
- Give the class quiet time (time to think: ask learners to read their notes, think about a problem, or summarise an idea in their heads)

Handouts

A handout is a hard copy text which supports, expands on, organises or otherwise provides follow up to the training. It is usually very important to the participants to receive handouts. The handout is a very powerful training tool because, when it is well conceived and designed, it provides reinforcement of the information transmitted during the training session and it remains with the participant for a long time.

When developing handouts for training it is best to think about how they might be used after the training is over. Your handouts will be very successful if your participants can use them:

- To remember what they have learned
- To extend their knowledge further by reading material not covered in the course
- As a basis for their work
- In cascading learning to their colleagues

Reasons for giving handouts

The main reasons for giving handouts are:

- To support the presentation or workshop
- To supplement the presentation or workshop
- To give learners something to go away with and read later
- To underpin the structure of the course
- To give general information on the course
- To organise a workshop or exercise
- To reinforce learning
- As preparation for the next lecture or workshop

Types of handouts

Presentation or lecture transcripts

This is a verbatim transcript of the speaker's words. It is rare for an experienced speaker to read a script, but they may have produced something for publication which is based on a frequently delivered lecture

Background notes

Background notes might be used in conjunction with a range of training delivery methods. They are comprehensive and detailed notes on the subject which can be used by the class to inform exercises and workshops or to supplement a lecture when there is not sufficient time to cover everything.

A set of the OHP transparencies or the PowerPoint presentation print-out

This is a very quick and easy handout to produce, especially if no handout has been planned in advance. However, this type of handout can tend to have little value to anyone who has not been present at the lecture.

An outline of the presentation

An outline of what is to be covered in the lecture can help participants to orient themselves during the session. It can also be the basis of a partial handout which involves participants in filling in the detail with their own notes.

The course outline

Course outlines are appropriate when the training lasts for more than a day or two. It informs participants about what subjects will be covered each day.

Bibliography

A bibliography provides the class with a list of useful publications for background or more detailed information on the topics covered in the training. A good bibliography will be well organised into sections and provide full information about authors, publishers and dates of publication. If there is time to annotate the bibliography it will really help your participants in deciding how to focus their reading.

Webliography

A webliography is a list of URLs or Websites which are relevant to the subject of the training. Although it is possible to produce a hard copy of a webliography, it can be more useful as a floppy disk or CD, since typing in URLs from a handout can be time-consuming and lead to errors. As with bibliographies, webliographies need to be well-organised and it is very useful to annotate them. Websites are much more dynamic than hard copy publications so, whilst this is a real strength, allowing your participants to have access to really up-to-the-minute information, it also means that they may change or disappear altogether. It is vital that you check your webliography regularly to ensure you are handing out accurate information.

Glossary

A glossary is a list of terms with definitions that are particular to a given subject or area of expertise. It is usually organised alphabetically and may cross-reference or self-reference where synonyms or wider terms and narrower terms are included. Although there are published glossaries, it can be very useful to develop your own as a common reference so that your class know what you mean when you use specialist terms.

Bio-sketch of trainers and speakers

Bio-sketches of trainers and speakers provide participants with information about the experience and expertise of the people delivering their training. This can help the class to frame more pertinent questions and to take full advantage of the expertise of the trainers.

List of participants

Most individuals like to receive a list of their fellow class members. Such lists are usually organised in alphabetical order by surname and at the least contain first and surname and employer / organisation details. Depending on the agreement of the class they can also contain contact details.

Programme or timetable

As with course outlines, programmes or timetables of the training inform participants about what subjects will be covered during the training. They are typically provided as part of the training publicity or at least as pre-course materials but it can be useful to include them as a handout in case participants have forgotten to bring them along.

Diagrams

Diagrams can provide useful illustrations of, or *aides-mémoire* to the subject matter of a training session. Sometimes part of the learning process may depend upon the class copying the diagram but often it is more effective to provide the class with a copy.

Exercise, workshop or discussion outline

An exercise outline provides written instructions for the exercise, explaining what the trainer wants the class to do or discuss and produce by way of feedback. It means the individual members of the group can refer to these to clarify their understanding of oral instructions. The handout can also provide space for the group to write notes for themselves and to use as a basis for their responses to the class as a whole.

Incomplete handouts

Incomplete handouts are notes which provide guidance or direction for participants to fill in details of what they are learning in class — either during a presentation, as an exercise, on return to the workplace or as preparation for training. It can be useful to provide full notes at a later date.

Useful articles

Published articles which support or supplement the training session can be very useful handouts which don't require a lot of work from the trainer. However, be sure to explain why you are giving it out and make sure you are not infringing copyright.

Examples of documentation covered by the presentation

This type of handout consists of copies of documents or sample documents which are relevant to the subject under discussion. Case studies and presentations on procedures and practice particularly lend themselves to this kind of material, such as examples of policies.

Quick quizzes and worksheets

Quiz sheets and other types of worksheets are handouts which can support, preempt or supplement a lecture or even the whole course. They can be used as an exercise, as a means for participants to evaluate their own knowledge before and after the training session. As with partial handouts, it can be helpful to provide an answer sheet after the exercise.

When to pass around handouts

It is important to distribute the handout at an appropriate time. If the handout is just bullet point headings and intended for the participants to add their own notes, it needs to be handed out at the beginning. If it is detailed notes it may depend on the type of class whether it should go out at the beginning or the end. If the handout is more interesting than the presentation you may lose the class by handing it out in advance. On the other hand, it may be that some of the participants find it easier to follow by reading along with the handout. If it

is to be distributed at the end, you will want to tell the class that the detailed handout is to come and they can sit back and enjoy the presentation without needing to take copious notes.

Other kinds of handouts are appropriate for the very beginning of longer training courses — for example the trainer bio-sketch and the programme. With exercises, group work, workshops and even facilitated discussion a handout can help the groups or individuals to get started by succinctly explaining what they are expected to do and giving space to make notes on their responses.

It is important to think through how many handouts you have, when they will be given to participants and how they fit together. It can be helpful to give the class a binder in which they can collect and store their handouts.

Teaching aids

There are many different ways in which a trainer can make the learning experience more interesting and memorable for learners. One technique is to use teaching aids. These are things used in the classroom to aid teaching and training. They fall into two main categories: visual aids such as overheads; and interactive tools such as a video programme or resource pack. It is good to bear in mind that too much material and too many different themes can serve to confuse the class. It is best to stick to a few techniques and, perhaps, follow one theme, example or case study.

Visual aids

Visual aids are visual representations which support presentations in the form of text, cartoons, graphs, illustrations, photographs. These can be OHP transparencies, handouts, flipcharts, posters, objects etc. They help to break up the monotony, providing a visual stimulant to reinforce what the learners are hearing.

The three main techniques for this use projection onto a large screen that everyone in the class can see. The oldest is using a photographic slide projector. The more modern and flexible overhead projector enables presenters to design their own text as well as pictorial illustrations. The most high-tech version is the use of a data projector, a computer and presentation software such as Microsoft PowerPoint.

When selecting your visual aid technology be aware of your audience's expectations. Photographic slide presentations are probably only suitable in specialised subject areas such as preservation and conservation.

With overhead projection the look of the presentation can be very professional as well as allowing individual tailoring that may keep the audience's attention. Certain audiences may expect presentation software but this option can be perceived as "flashy" and is often very similar visually to every other speakers' presentations which can make it monotonous.

Photographic slides

Depending on the subject matter of your presentation, it may be appropriate to use photo transparencies. These need special equipment — a projector and a carousel, usually with a trigger mechanism to allow you to move to the next slide. The slides are loaded into the carousel, the first slide is projected at the appropriate time and the rest in sequence either manually by an operator (who may or may not be the presenter) or automatically by the speaker with a remote control. As with any visual aid relying on technology, it is vital to make sure the equipment is working before the presentation begins. Depending on how reliable your computer technology is, it may be more efficient to scan the slides and incorporate them into a PowerPoint or similar presentation.

Overheads

Overheads are also known as OHPs, slides and transparencies. They are pictures or writing printed, written or drawn onto a sheet of acetate. This can be placed on the bed of an overhead projector and via light and magnification technology an image is projected onto a white wall or screen.

OHPs can be a very robust and resilient form of visual aid as the technology is cheaper, less prone to break-down and glitches than computer technology, and as you can write on blank transparencies, can be very responsive to classroom needs as when the trainer wants to elaborate on something or groups want a visual aid to feed back to class. They are also more flexible as you can change the order, and add or drop slides during a presentation according to need.

You should always test the equipment before you start your presentation. The focus may need adjusting, or the position of the projector or the screen. You should also assess the best place to stand so that everyone can see both you and the screen.

There are some helpful rules to follow when developing and using overheads to support your lectures and presentations:

- Don't have too much information on a slide
- Use a large font size (ideally at least 20pt), and a font that is easy to read
- Using pictures, cartoons, your own illustrations, photos and diagrams is good as it breaks up the monotony of reading and listening. They can also be amusing. If you can't find anything else, clip art is a useful resource
- Studies show that participants pay more attention to colour overheads
- Time your overheads well — if the class is copying you need to leave them up long enough
- Don't click swiftly through your overheads like a photo slide show
- Don't be afraid to elaborate while the OHP is up
- If there is a pause without an OHP to show, switch off machine as the blank screen is annoying and the noise of the fan can be distracting
- Try not to turn to the screen to indicate detail on the projected image, use a pointer on the OHP itself and face your audience
- Try to ensure that the OHP projector is situated where you can use it without blocking the audience's view

Presentation software

Presentation software is a special computer programme which allows you to design a format, draft text and include illustrations which can then be projected and magnified onto a screen for the class to watch while the speaker makes his/her presentation. The equipment configuration varies but usually there is a desktop computer or laptop linked to a data projector. There can sometimes be issues of compatibility with the computer equipment if the laptop is a different age from the projector, for example. It is important to test the equipment before starting the presentation. Although when first beginning to use powerpoint the technical expertise required to connect the equipment and bring up the image can seem rather beyond you, after a while you get to understand the tricks to set yourself up and to solve problems.

The software will also generate a variety of documents that can be used as handouts or as the basis for annotated speakers notes. It is advisable to attend training to learn how to develop computerised presentations. The training will cover how to design the layout, select fonts, insert illustrations, draft text and specify the speed and delivery of the text on the screen. When developing presentations you can select from a broad range of backgrounds, fonts, styles and formats. The software, particularly Microsoft PowerPoint, provides some of these and you can also customise to use company logos or personal favourite clip art, etc. Unless you have access to designer input, it is best to keep computer-based presentations as simple as possible. One big advantage of computer-based presentations over the other two techniques is that you can change the presentation very easily and there is no need to change a hard copy unless you are providing the software generated handouts.

Look at the tips provided for OHP design above for guidelines to help produce effective and professional presentations.

Objects, pictures or documentation which are handed around the class but which do not constitute a handout

It can be useful to circulate objects around the class to illustrate a point the speaker is making. Examples of this technique are:

- Mouldy records (sealed in a plastic bag) in a preservation management class
- An old hard drive in a digital records management class

A similar technique is to circulate examples of documentation when either there is either too much or it is inappropriate to make copies for everyone. Photos, catalogues and books also lend themselves to this treatment.

Remember that individuals will be focusing on the circulated item at different times and may miss some of the accompanying lecture — it can be more effective to leave them out for students to examine during a break.

Other teaching aids

There are many different types of teaching aids and it is possible that you will invent a few unique kinds of your own. The examples given here are intended as an introduction rather than an exhaustive list.

Resource packs and handbooks

A resource pack is a collection of documents which supports the teaching or training. It is best to present them in a labelled folder. A handbook is also a collection of supporting documents but the material is bound together in a book. They are both integrated and comprehensive so that the learner has all the materials together. It differs from a set of handouts in that the material is all given out at once, usually at the beginning of the training. It may also contain information on subjects not covered in the classroom sessions.

Videos, DVDs and audio tapes

Videos, DVDs and audio tapes can be useful ways of reinforcing, introducing or filling in detail on the subject being taught. These can be shown to the class as substitute for a lecture or presentation and used exactly the same way with the participants free to take notes as they choose. They can also be used more interactively as follows:

- they can be used in conjunction with an exercise sheet which requires the class to fill in details from the visual/aural experience
- time is allowed for discussion before and/or after the showing

Document cleaning packs

A document cleaning pack containing a mask, rubber gloves, plastic eraser, paint brush, duster etc. can be used to demonstrate simple document cleaning techniques.

Role-playing

Role-playing is where members of the class are given a part or character to play in a fictional situation. This can be completely free-form where everyone can invent their view-point for themselves. It can be more effective if the trainer devises a detailed script. The objective is for the class to think about the subject in a real life situation and is particularly effective if focused on areas of conflict within and between teams for example relationships between archivists / records managers and IT specialists.

Examples of publications which can be used as teaching aids

Chapter Three of *Selected Essays in Electronic Recordkeeping in Australia*, edited by Judith Ellis (published by the Australian Society of Archivists, 2000), "Imperatives for Effective Recordkeeping a Two Act Play" by Helen Smith, is a very good example of a published role-play which illustrates the dynamics between the various organisational interests and players in corporate records management.

Preservation Management of Digital Materials, by Maggie Jones and Neil Beagrie (published by Resource/LMA, UK, 2001) contains the "decision tree for selection of digital materials for long term selection" which can be used as the basis of a learning exercise to help participants recognise and apply components in a digital preservation strategy.

The US National Institute for the Conservation of Cultural Property produced the "Emergency Response and Salvage Wheel™" which can be used as the basis for an exercise around the various prevention and response measure that organisations need to have in place for disaster preparedness.

Assessment

Assessment is the process by which you and the class judge their existing knowledge and also their increased skills and awareness of the training subject matter as a result of the course.

Pre-training assessment

It can be useful (but not always possible) to have participants fill out a questionnaire prior to training which will give you as the trainer some background information on the class' knowledge and experience in the field. This can also be helpful for participants in beginning to prepare for the training.

The kind of questions to ask are:

1. Name
2. Grade
3. Current job
4. General responsibilities
5. How long in Records/Archives Management
6. Qualifications
7. Details of previous training courses attended
8. Why they are attending this training
9. What they hope to gain from this training
10. Any other comments

Participant self-assessment

Another useful form of assessment is participant self-assessment. This can be done in a variety of ways. You might provide a more general questionnaire for participants to assess how much they know about given topics to be tackled during the training. You can leave space for them to return to it after the training and rate their increased knowledge. Another approach is to begin the training with a set of questions or a quiz, allowing the class time to answer the questions or examine the problems set. You can then go through it when they have completed it and they can assess for themselves what they knew before and after.

Feedback on class exercises

During the course of the training it is likely that you will set the class some tasks to work on on their own or in groups. It is very important that when the class reports back the trainer gives considered and useful feedback. The participants have spent time on the activity, may have been uncertain as to their ability to tackle the problem and will be looking for reassurance, and tips for improvement from the trainer. Usually the class will feed back

orally, if they are in groups each group will have chosen a spokesperson. They may or may not provide a visual aid such as a flipchart sheet. When listening to the presentation look for the following:

- Has the group answered the question?
- Have they covered all aspects of the problem set?
- What was particularly strong in their presentation?
- What have they missed out or what could be better?

When the presentation is over, you might ask the class to give their views before adding your own comments. It is extremely rare that you will find nothing to say and you should try to spend an equal amount of time commenting on all presentations.

Assessment by trainers

Although formal assessment is rare in the kind of training addressed in this Pack, it may occasionally be necessary to give detailed assessment on individual participants. If the assessment is for every participant as part of an accredited course, you should follow any guidelines given by the parent institution. In general it is advisable to develop some sort of marking schema for written work or oral presentations and to read through or listen to and assess each piece of work according to the same criteria. If the assessment is more informal, be honest in your comments — note where the work is good and suggest improvement where it is weak or there are gaps.

Evaluation

Evaluation is where the participants and trainers are required to judge the quality and success of the training.

It is essential that the trainer receives feedback from participants on the effectiveness of the course. It is also important for participants to have the possibility to raise concerns, make suggestions and reflect on what they have learnt. Evaluation helps the trainer to refine and improve the design, content and delivery on a regular basis.

General impressions in the training room

As you gain experience as a trainer you will be able to tell from the behaviour of your participants and the group dynamics whether or not the training is effective. For example, if the group is asking a lot of relevant questions, offering their own experiences and problems and/or participating actively in the exercises and set tasks, this indicates that they are enjoying the training — and therefore are probably finding it useful and relevant. Often participants who feel they have benefited from the training will say something to the trainers as they leave the room — even a mere thank you implies that the participant has appreciated the experience!

Planning written participant evaluations

It is however important to collect more concrete and objective evidence about the training which can be used to improve and plan future training events. You will want to gain information on:

- The participants' experience of the training including the various sessions, group work, venue and facilities
- The participants' assessment of the relevance of the training to them
- The effectiveness of the training in the participants' experience
- The participants' further training needs
- Whether the training has met any learning aims stated in the pre-course literature

Timing and length of evaluation

In developing your evaluation form you need to take into consideration the fact that most participants will not wish to spend a long time filling it out. You should also decide whether a shorter evaluation completed by most participants before they leave the room is of more value over all than a more detailed one which participants take away and which a proportion never return to you. For short courses it is best to give the evaluation out at the end of the day so that it can be completed before participants leave. If the training course is spread over several days it can be a good idea to ensure that the participants have the evaluation form at the beginning of the course — and you could even give them time each day to complete a relevant portion. Evaluations work better for longer courses than short ones; it is as if the participants are prepared to spend a proportional amount of time on it.

What to include in the participant evaluation

Here is a checklist of the various aspects of the training to be included in the evaluation:

- Whether the course aims, learning objectives, etc. were met
- Specific questions about the relevance of each session: whether the information conveyed was appropriate and adequate; whether it was delivered in an interesting or engaging manner
- How participants received and benefited from any significant piece of course work that was set
- Whether anything was missing from the training
- Quality and relevance of handouts
- Convenience of the venue
- Space afforded by the venue
- Temperature and air circulation in venue
- General impressions of venue (conducive to training, relaxed atmosphere, etc.)
- Quality of catering: on time, adequate, value for money
- If the participants have any further training requirements

It is up to you whether you decide the evaluation should be anonymous or not. Anonymity will give your participants the freedom to be frank in their comments and judgements and in any case usually the most positive evaluations are marked by the fact the participant has chosen to sign their comments.

How to phrase questions to give qualitative responses

It is possible to develop evaluation forms which ask for more subjective and free-form responses from participants, for example using open questions such as "What did you think of the session on archival description?". However, twenty responses to this question, each potentially giving a unique variation, can be hard to render into a useful overall judgement on the success of the session and what might be done to improve it. It is better to ask a clear question and request a judgement based on a scale of one to five or six. An example of this approach is given below:

Session	Was the content useful and adequate?	Was the content delivered in an interesting way?
	Circle number which reflects your assessment	
Introduction and First Principles	1 2 3 4 5	1 2 3 4 5
	KEY: 1. excellent; 2. good; 3. OK; 4. poor; 5. disappointing	

Follow-up for participant evaluations

Whilst it is good practice to evaluate training, there is no point in wasting time collecting this sort of evidence if you are not going to act on the results. If the evaluations are mainly positive, there may not be much that you wish to change — although participant evaluations can be positive yet include good ideas for changes in content or amplification of material either in the sessions or handouts. You will need to exercise your own judgement about minority negative evaluations. Perhaps the minority have valid criticisms which you can address whilst maintaining the things that the majority have obviously appreciated. This is where a combination of participant written evaluation and your own assessment of the training experience is useful.

Trainer evaluation

It is also good practice for the trainer to evaluate the training. Even if you only take five minutes to reflect on the participant evaluations and your own assessment of the way the course has worked this can be used to adjust any future repeat of the training. If you have been commissioned to deliver the training, or of you need to report on your training activity you will want to put together a more structured breakdown of the course.

Here is a checklist of the various elements you might want to include in a report on a training course:

- **Administration**: as this might have been managed by you or by another agency, it is good to report on whether the administration of the course was effective. This could include registration, advertising and pre-course information, housekeeping and support at time of training delivery etc.
- **Course aims and objectives**: here you will want to repeat the aims and objectives and report on how well they have been met both from your own assessment and from the evidence of the participants' evaluations
- **Programme**: you should include the programme as it was delivered (probably this is better as an appendix), together with any relevant comments or explanation. You can note here any changes you would make in future as a result of the various evaluations.

- **Course content**: you will want to spend some time here going over the course content and commenting on how it worked on delivery together with the participants comments. This will need to be both specific to individual sessions and cover how the various session worked together as a whole.
- **Guest speakers**: if you have had guest speakers you will want to comment on their performance (again from your own assessment and the participant evaluations) and offer suggestions for change or improvement as appropriate.
- **Class participants/composition**: here you would detail the numbers, places of work, general background and any other relevant information about the group you have trained.
- **Participation levels**: most training demands some level of participation or attention. You should note here your own impressions of how active the class has been.
- **Participants' evaluation**: this is the most important bit of the report. Here you will summarise the evaluations, perhaps giving a statistical breakdown, and comment (if necessary or appropriate) on the returns.
- **Any significant piece of course work**: for longer courses you may have set a piece of work for participants to complete before the end. You should describe it here and add any relevant comment or assessment of your own.
- **Handouts**: again, the participants will have evaluated these but you should detail what you provided and add your own assessment and comments.
- **Venue and catering**: although the participants will have commented on this, your input is also useful — for example, you may not have had much choice in the venue or caterers
- **Equipment**: participants may not have been asked to comment on this but for you and the guest speakers the equipment and facilities in the training room are important. Comment on them here.

Training definitions

assessment
> The trainer's — and sometimes the participants' judgement of individual existing knowledge and progress of those participating in the course.

brainstorming
> Group exercise where participants call out ideas to solve a specific problem or plan a particular project and the ideas are listed on a flip chart or whiteboard. Suggestions can be called out in any order; no explanations, justifications or comments are needed.

break-out groups
> Small groups which work on the same problem or different aspects of the same problem at the same time. On completion of the task each group reports back to the class so they can compare other groups' ideas with their own and the trainer can give feedback.

break-out rooms
> Rooms where smaller groups of the class can work without disturbing or being disturbed by others.

buzz groups
> Informal short sessions where the students talk to the people next to them about a given topic. Usually used to break up a lecture or presentation.

case study

Description of a real-life experience related to the field of study or training, used to make points, raise issues or otherwise enhance the participants' understanding and learning experience. These are particularly useful when no practical experience is possible within the course.

certificate

A piece of paper or light card which documents that a student has attended a training course and/or records achievements in a course.

class activities

Activities where the students actively participate to solve a problem, plan a project, etc. Serves to establish the students' level of knowledge or reinforce learning.

course

A series of lectures, training sessions or days that comprise a discrete learning package.

coursework

A piece of work set for participants to be completed during the time the training takes place.

delivery

The act of transferring the whole of the training to the participants — this covers the time in the classroom, not the design and preparation of the course.

distance learning

Learning where the trainer and the students are separated by distance and interact primarily by post, computer (e-mail, bulletin boards, Websites, Usenet groups, etc.), phone or a combination of these and other communication methods.

education

A systematic kind of instruction or intellectual and moral training designed to give participants a broad and/or deep understanding of the topics covered. Usually associated with children and young people.

evaluation

The participants' — and sometimes trainers' — assessment of the training course covering all aspects from catering and accommodation to course content and performance of the trainers.

experience

Knowledge or skill resulting from actual observation or practice of event or technique.

expertise

Expert opinion, skill or knowledge in the field.

facilitated learning

Training characterized by students having a high degree of involvement in all aspects of their learning. The teacher's role is facilitator and organiser providing resources and support. Participants learn with and from each other and set their own objectives.

facilitator

Person who facilitates or eases and enables discussions, groupwork, projects etc. May chair or choreograph entire training course or programme.

handout

A hard copy text which supports, expands on, organises or otherwise provides follow up to a presentation or course.

individual learning

Where learners plan and organise their own learning path, may be a mixture of attending classes and studying alone.

knowledge

Theoretical or practical understanding of a subject or profession: an individual's range of information on a topic

learners

People who place themselves in a position to learn from any form of training or education.

learning outcomes

Set of stated objectives that should be achieved as an outcome of the training.

lectures

Presentation delivered to a large number of learners by a teacher, usually 50–55 minutes of uninterrupted discourse from the teacher with no discussion, the only learner activity being listening and note-taking.

on-the-job training

Very practical training designed to give working participants either the necessary skills to carry out their job or to enhance their skills and knowledge to enable them to advance in their careers.

participant

Student, learner or other attendee of a training course.

practitioner

Person who is actively practising their profession.

presentation

A focused talk, using visual aids, on a given subject to inform, instruct or persuade the audience.

profiling participants/learners

The act of researching and assessing the constituency of possible learners for training or education.

sessions

Discrete portion of a training programme dedicated to a delineated topic: can be a lecture, exercise or any other type of delivery.

skills

Practiced ability or facility in doing something.

small group work

Tasks set by the trainer to be undertaken by the class divided into small groups. They may all be given the same or different tasks to do.

speakers

People who train or teach by delivering lectures or presentations.

students

Learners, but more often associated with those attending university or a longer course of study.

study

To investigate or acquire knowledge of a subject in depth.

SWOT analysis

Exercise to assess strengths, weaknesses, opportunities and threats offered by a situation or object.

syndicates

See break-out groups

teach

To transfer knowledge in a theoretical way, usually in a formal environment such as school or university.

teaching aids

Items used in the classroom to aid teaching and training. May be visual aids or interactive tools.

teaching resources

Anything used by teachers and trainers to develop into their own materials to use when delivering training, such as books, journals, Websites, bibliographies, databases, equipment, etc.

techniques

Technical skills and methods to achieve a practical task.

theory

System of ideas and principles used to explain a practical occurrence or methodology.

train

To transfer knowledge and skills that enable participants to carry out their work; tends to focus on job skills and awareness-raising.

training aids

See teaching aids

training materials

Lecture notes, exercises, lesson plans, etc. used by the trainer interacting with the learner.

visual aids

Visual representations which support presentations in the form of words, cartoons, graphs, illustrations, photographs. These can be OHP transparencies, computer-generated projected images, handouts, flipcharts, posters, objects, etc.

Further reading

There are many resources which archival educators and trainers can draw on to get ideas for the development of training materials and courses generally. Any experience of training, from first aid, to health and safety, to practical session on new computer software and evening courses and classes taken for pleasure can be used as an opportunity to re-examine one's own teaching and training techniques.

If you have access to the world wide web there are many sites that can be invaluable to trainers. A search on the subject matter will yield research material for new training areas and a search on techniques can also be very productive. It is also possible to find illustrations of all sorts for visual aids and handouts.

Bibliography

We offer here a short reading list as an initial starting point for those who wish to develop their teaching and training techniques more fully.

The Open Learning Handbook, Phil Race (Race, 1994)

Preparing to Teach, Graham Gibbs and Trevor Habeshaw (Cromwell Press, 1984)

52 Interesting Things to Do in Your Lectures, Graham Gibbs, Sue Habeshaw and Trevor Habeshaw (Cromwell Press, 1995)

Planning a Course, Ian Forsyth, Alan Jolliffe and David Stevens (Kogan Page, 1995)

How to Make and Use Visual Aids, Nicola Harford and Nicola Baird (VSO Books, 1997)

Useful contacts

International Council on Archives

The International Council on Archives' mission is the advancement of archives worldwide. In pursuing the advancement of archives, ICA works for the protection and enhancement of the memory of the world. The Website, **http://www.ica.org/** has many useful pages for archival educators and trainers, the publications page is particularly useful as it contains standards and studies (research results and guidance on current issues for archives and records management, prepared by ICA's international professional committees and working groups). These can be found at: **http://www.ica.org/en/publications**

The ICA's address and contact details are:

Conseil international des Archives
60 rue des Francs-Bourgeois
75003 PARIS,France

Tel: (+33) 1 40 27 63 06
Fax: (+33) 1 42 72 20 65
E-mail: **ica@ica.org**

International Council on Archives: Section on Archival Education and Training

This Section of the ICA aims to establish closer contacts among teachers of archival science and to work towards the development of methodology and preparation of tools to assist them in their teaching tasks and in their contributions to the development of the profession. The Section's Website can be visited at **http://www.ica-sae.org/**. It is the first place for archival educators and trainers to look for news of conferences, publications and projects for their field of expertise.

UNESCO Archives Portal

The UNESCO Archives Portal is another useful site for archival educators and trainers. The Website, **http://www.unesco.org/webworld/portal_archives/**, has online access to the rather elderly but nonetheless still relevant RAMP studies covering basic archives and records management issues.

The International Records Management Trust

The IRMT Works mainly in developing countries. The Website, **http://www.irmt.org/**, is primarily of interest to archival educators because of the training materials from the Managing Public Sector Records.

The IRMT's address and contact details are:

Haines House, 6th floor
21 John Street
London WC1N 2BP
UK

Tel: +44 (0)20 7831 4101
Fax: +44 (0)20 7831 6303
E-mail: **info@irmt.org**

ARMA International

ARMA International publishes a large number of publications which can be used both as texts for students and as the raw material for developing teaching materials. They also offer e-learning solutions which are a good way of learning about a modern way to deliver training and education.

They can be contacted at:

13725 W. 109th Street, Suite 101
Lenexa, KS 66215
USA

Tel: (+1) (913) 341 3808
Fax: (+1) (913) 341 3742
E-mail: **hq@arma.org**

Society of American Archivists

Like ARMA, SAA has a strong publishing section and produces many publications that are useful for archival trainers and educators.

The Society can be contacted at:

527 South Wells St., 5th Floor
Chicago, IL 60607
USA

Tel: (+1) (312) 922 0140
Fax: (+1) (312) 347 1452
E-mail: **info@archivists.org**

The Archive-Skills Consultancy

The Archive-Skills Consultancy is a commercial partnership specialising in archives and records management work, including both projects which address a wide range of client requirements in the field and training for clients in-house as well as an independent training programme aimed at a wide range of participants in need of practical, fit for purpose and affordable training. The TASC Website, **http://www.archive-skills.com/**, contains info-bytes on a variety of key issues for archives and records management, extensive useful links pages and a growing section on self-training opportunities and ideas.

The Archive-Skills Consultancy can be contacted at:

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