

# Creating a Participant/ Facilitator Guide

ATD MEMBER-ONLY TOOLS

# Creating a Participant/Facilitator Guide

TEMPLATES & TOOLS



## Introduction

Creating a participant guide, including guidance for the facilitator, is a great way to support the valuable learning experiences you provide. A participant/facilitator guide may include traditional components such as text and illustrations as well as additional support material such as an appendix with references and job aids. Keep learning objectives and the learner experience in mind to promote the transfer of the learning to the job.

**When establishing the elements of a participant/facilitator guide, consider these points:**

### Focus on the Job

- ☐ **Use learning objectives as a guide:** Learning objectives, aligned with desired organizational outcomes, serve as a foundation for what to include in a participant/facilitator guide. When choosing content, ensure it supports learners' success on the job.
- ☐ **Address processes:** To support a focus on the job, include processes that align with ideal performance. Include steps, decisions to be made, and annotated illustrations of situations learners will experience on the job.

### Use Illustrations

- ☐ **Select effective images:** Use learning objectives to determine images that add to the learning experience. Highlight connections to help learners understand concepts. Consider the source of illustrations—internal creations or external purchases.
- ☐ **Display process diagrams:** In addition to relevant images, display process diagrams to guide learners through procedures they will use on the job. Process diagrams can illustrate steps as well as decisions with associated consequences, showcasing ideal effects.

### Promote "Chunking"

- ☐ **Outline relevant headings:** When creating an outline, document relevant headings to help organize the content into manageable chunks. Facilitators can use these headings as guideposts for the flow, and learners can use these headings for quick reference.
- ☐ **Use lean text:** Present the words in brief segments to manage cognitive load. The lean text promotes form and function, appealing visually and providing access to salient points.

### Determine Support Materials

- ☐ **Include reference materials:** When creating participant/facilitator guides, make choices regarding material to include to optimize training time. No two learners are the same. To help address varying backgrounds, interests, and responsibilities, include references such as links to use outside training as well as organizational or research material to appeal to a variety of learners.
- ☐ **Create job aids:** Creating job aids to include in the participant guide/facilitator guide allows learners quick reference to relevant material on the job. Confirm the delivery method, as interactive digital job aids may provide quick access and annotation opportunities to meet learners' needs on the job.

# Creating a Participant/Facilitator Guide





## Creating an Outline

Staring at a blank screen can be daunting, so use an outline to get started. Begin by creating a framework for your participant guide or documenting notes for guiding your facilitator. Which one you do first may depend on your comfort level with the material, how much content you already have, and the facilitators' needs. Review your analysis findings to decide whether to create facilitator guidance before developing the content for the participant guide.

**The participant guide helps learners during the learning experience and offers reference material on the job. Consider these steps when creating a participant guide outline:**

### Hierarchical Structure

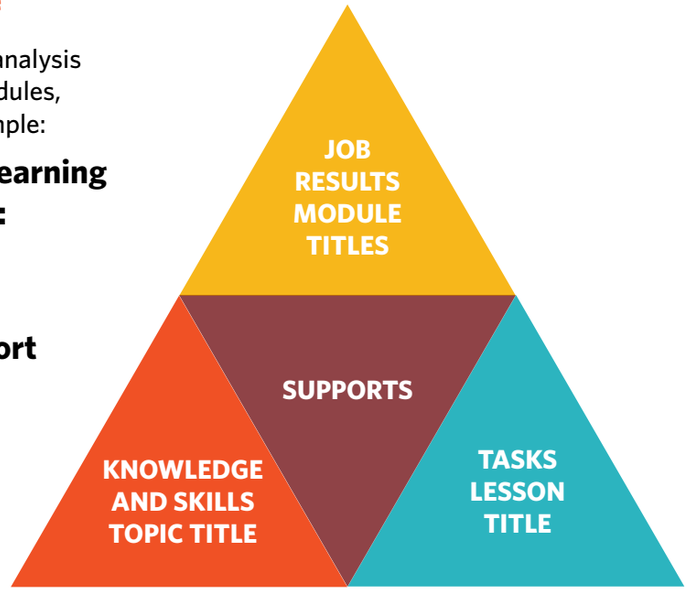
Use the results of your task analysis to support a structure of modules, lessons, and topics. For example:

#### Compare Titles with Learning Objectives to Confirm:

- alignment
- targeted content.

#### Create a Map to Support Learning Needs with:

- text
- illustrations
- exercises.




### Sequencing Options

#### Focus on the Job

- Arrange content according to performance.
- Illustrate the ideal approach.

#### By Topic

- Organize by on-the-job experiences, not in any particular order.
- Support learning objectives.

#### By Tasks or Features

- Use for brief sessions with stand-alone concepts.
- Establish value.
- Provide reference material.
- Support e-learning and microlearning.

# Creating a Participant/Facilitator Guide





**The facilitator guide gives instructors a plan for the learning experience. Instructors use the pointers, notes, and directions to prepare for and lead the program.**

**Consider these steps when creating a facilitator guide outline:**

## Course Pointers

Outline the course agenda and timing, including the:

- overall plan
- progress milestones.

Create a supplies list to confirm:

- equipment
- learning materials.

## High-Level Module Notes

Preparation:

- Confirm policies and procedures.
- Document success stories.
- Outline demonstration.

Specific module timing:

- Follow course agenda.
- Illustrate the timing of breaks and exercises.

Purpose statement:

- State the benefits for the learner and the organization.
- Establish a module introduction statement.

Key points:

- Highlight expectations.
- Confirm content.
- Assess comprehension.

## Directions Throughout Module

Specific lesson timing:

- Highlight at the beginning.
- Offer a checkpoint.
- Outline demonstration.

Presentation tool use:

- Indicate slide or other visual aid (diagram or chart).
- Provide thumbnail sketches.

## Words to Use

Consider the necessary level of detail:

- need for consistency
- support for subject matter experts (smes)
- guidance for new facilitators

Examples of script and instructions:

- SAY: provide text to communicate to learners
- DISCUSS: illustrate concepts to support an exchange with learners
- ASK: list questions such as opening polls and knowledge checks
- DO: outline instructions for actions such as demonstrations and exercises

# Creating a Participant/Facilitator Guide





## Using a Template

You've decided what you want to include and how you want to approach your participant/facilitator guide. Now it is time to begin creating the actual materials. Using a template, including confirming the format of facilitator guidance, promotes an efficient development process and creates consistency in formatting.

**Here are a few tips:**

### Confirm Branding Requirements and the Availability of Existing Templates:

Meet with your marketing department or those who are responsible for communication or documentation. Determine whether your organization already has standard documents from which you could create a participant guide.

### Seek Approval of New Designs:

If you do not have an organizational standard, create sample designs and present the samples to your stakeholders. You may choose to circulate the examples digitally or hold a meeting to gather feedback. Edit your samples accordingly before developing the participant/facilitator guide. Involve facilitators who will use the facilitator guides to determine what will work for them.

### Include Hidden Text for the Facilitator Guidance:

When you use hidden text, you may have to get creative with formatting. For example, having multiple pages of facilitator guidance will diminish the value of one participant/facilitator guide. Instead, use any white space available such as on the side of the participant guide text under headings, in tables reserved for learners to document notes, and at the bottom of participant guide text. Another idea is to format the hidden text in a different color, so it stands out when printed or viewed electronically.

### Confirm the Production Process:

Templates can support the production process. To complete compilation of the participant guide/facilitator guide, consider including title pages for the whole course and individual modules, a table of contents, an index, and an appendix. The templates you use may include styles for these additional elements to produce polished materials.

# Creating a Participant/Facilitator Guide



## Reviewing Samples

The following are examples of participant/facilitator guides for your consideration. Note the callouts, highlighting various items you may wish to include in your materials.

## Facilitator Action Items

**ASK:** What do you use to help you as you prepare a training delivery? Are you using a model or outline?

**SAY:** Everything we do can be described as a process—the steps taken to reach the end result. When we follow the process, it leads to desired or planned results. Trainers have a process to achieve results.

**DO:** Provide an overview of the training cycle and explain that it can guide their training cycle for training deliveries, and will also serve as the structure of this three-day course.

**SAY:**

- Starting with **Purpose and Assessment**, the steps of the trainer's process build on one another. A trainer must be certain that training is the best solution, and this will be clarified using Purpose and Assessment.
- The **Planning and Preparation** step is the key to success for everything, including training.
- The **Presentation and Facilitation** step may be seen as the trainer's core product, although there are many other critical aspects fro a totally successful result.
- Even though the presentation continues to be the easiest to observe, **Evaluation and Performance** is truly the measure of success.

### Participant Guide Sample




ILLUSTRATION

A trainer's process beings with the knowledge that training is the solution. Starting with understanding the purpose, trainers move through a cycle: **Purpose and Assessment, Planning and Preparation, Presentation and Facilitatoin, and Evaluation and Performance.**

EXPOSITORY TEXT

# Creating a Participant/Facilitator Guide



**Module 2: Planning and Preparation** ← MODULE TITLE

## Activity 3: Assumptions and Applications ← ACTIVITY TITLE

### Instructions

Trainers turn assumptions into application to ensure that adults have the most success possible in every learning setting. What is your responsibility in each instance below?

TABLE →

| Assumption | What would you do in your training programs to address this assumption? |
|---|---|
| Adults learn because they want to or have to learn. | Trainers must clearly state the answer to "What's in it for me?" |
| Adults have different learning styles. | Design to accomodate all the learning styles by including variety with technology, such as slides and sounds for in-person and online sessions; modify your training style. |
| Adults learn best in an informal atmosphere. | Provide a climate of mutual respect, support, and friendliness; be non-judgemental. In online sessions, make sure that learners understand how they can participate at any time using the chat feature, in addition to having opportunities to use other interactive tools such as the text tool to write on the presentation screen and polling features. |

FG: FACILITATOR GUIDANCE →

## Participant/Facilitator Guide Style Tips

**Confirm Delivery Method:** Determine whether learners and facilitators will receive materials in hard copy or electronically. If electronically, investigate the devices used since this may inform style choices. For example, create an editable pdf for learners' notetaking opportunities and format for viewing facilitator guidance on a mobile device.

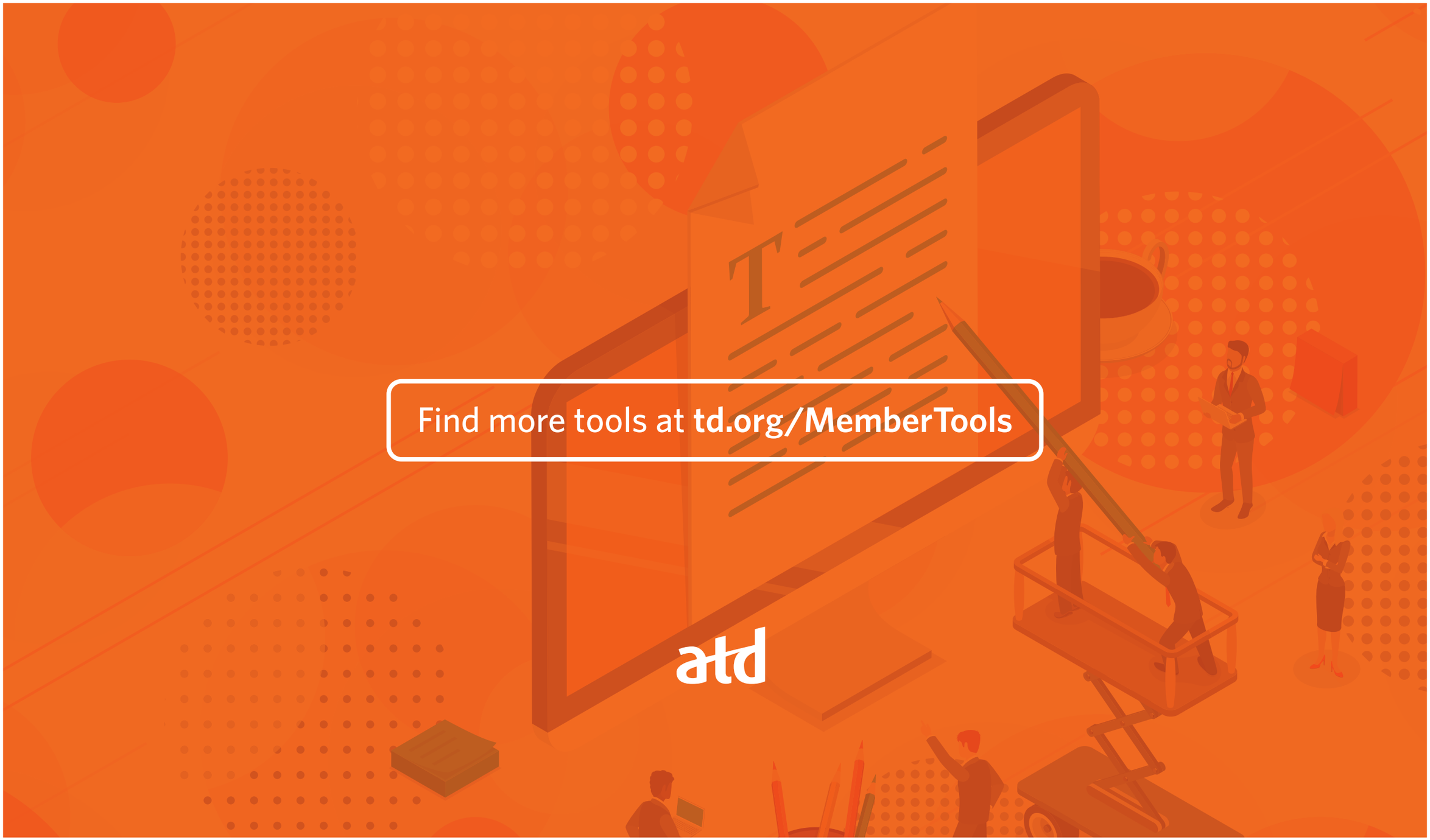
**Determine a Writing Style:** Be clear and concise, using brief sentences and simple words. Confirm the desired tone with stakeholders to maintain engagement with your learners.

**Format for Quick Reference:** Learners want to access relevant information with ease during the learning experience and as a resource back at work. Use information mapping principles, such as structuring material into tables or bulleted lists, to promote access to details in the content.

**Establish Consistent Formatting:** While we address the use of templates, consider the learners' perspective. Consistent formatting provides ease of access to the material, saving learners' time.

**Annotate Guidance:** Use lean text and limit the number of notes in an image or diagram to what learners need to know, not everything there is to know. To provide explanations, consider connecting to tables that contain expository text.

**Embrace Graphic Design Fundamentals:** Visual appeal supports the learning experience by making your materials easy to digest. For example, using styles helps you quickly format text and graphics and promotes consistency throughout your participant/facilitator guide.


Find more tools at **td.org/MemberTools**