

Effective learning depends on the sequential occurrence of six steps that are collectively referred to as the learning loop. Leaving one or more of these steps out of the learning process could jeopardize the success of the training.

Motivate

For BC Ferries employees, the motivator may simply be the fact that they need the training to maintain their employment. Your role as a trainer is to add motivation for each student. As you introduce the training topic, for example, "Passenger Safety Management" you must generate excitement about the practical learning possibilities, motivate the individuals to be willing to learn, and create an opportunity for buy-in. You can also do this in your introduction or through an **opener** (6).



Demonstrate

Demonstrate the type of information required to "control passengers". Show the learners real examples of how they can use these new skills to make the workplace safer.

Teach

Provide detailed instruction on all steps required to achieve the instructional goal (3). Allow sufficient time for this phase and allow learners the opportunity to ask **questions** (17) as you progress.

Practice

Ask your class to complete the step-by-step instructions on their own. If your assistance is required, you may explain the steps again on a one-on-one basis or to the entire class, as appropriate. If one student catches on right away you may be able to use them to assist those who need more practice.

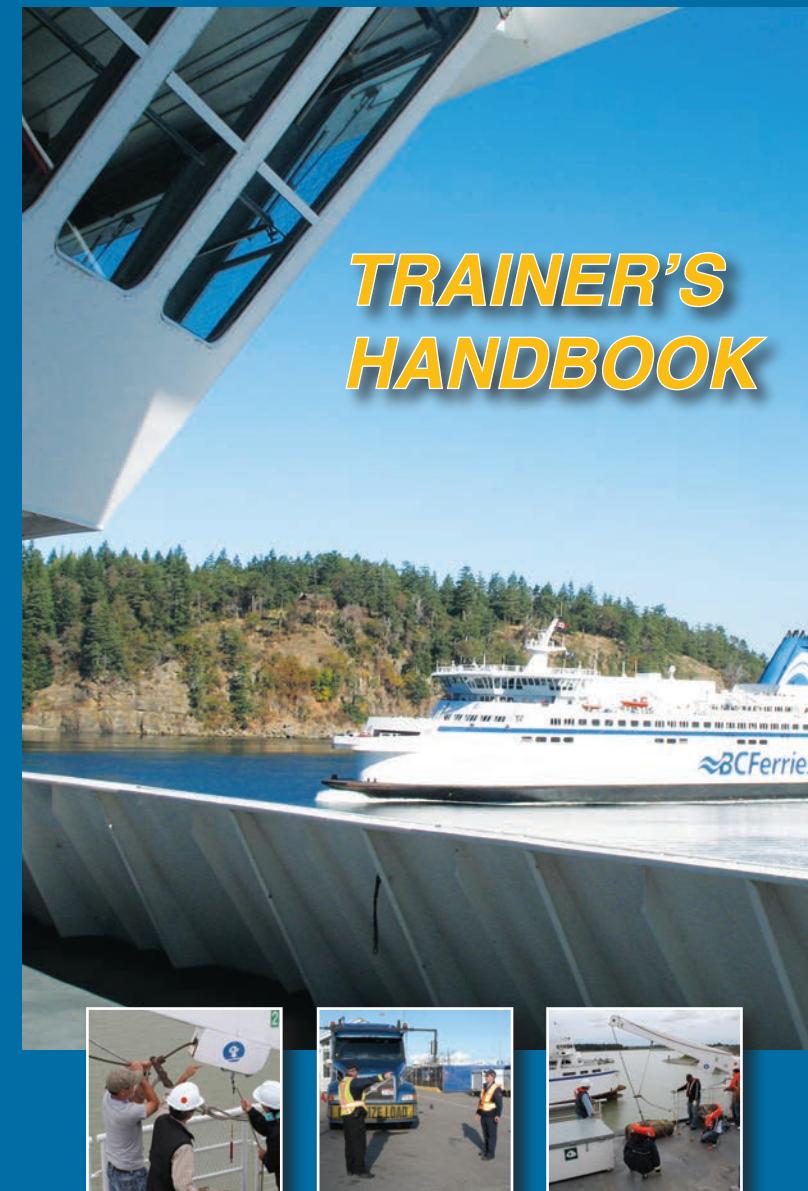
Summarize

This step reinforces previously learned concepts. Use statements such as: "First, we did ..., then, we did ...". Some instructors summarize by asking learners quick questions such as: "What did we do first?" and expect point-form answers, as this format stimulates learner participation. This review also works well as a **closer** (15) at the end of the training.

Evaluate

Discuss the benefits and application of what was learned. Questions like: "How will you be able to apply this information?", followed by answers such as: "I will be more confident when directing passengers", allow you to tie back to the beginning where you motivated the learners. You have now successfully closed the learning loop!

TRAINER'S HANDBOOK



Created by the Operational Training Group, BC Ferries

1 The Learning Organization

The Learning Organization is a vision of what is possible. It is not created by simply training individuals; it only happens as a result of learning at the whole organization level. A learning organization facilitates the learning of all its members and continuously transforms itself. (Pedler et. al., 1991)

At BC Ferries, what do we want our Company to be now and in the years to come? How do we incorporate our Company vision and core values into our training strategy?

As we approach our workplace training activities, it is crucial to consider how the training will contribute to the organizational development at large. This is considered through the design, delivery and evaluation phases to create more effective and reflective training.

As a trainer – do you use the Company vision and values as perspective for your overall approach to training?

COMPANY VISION

“To provide a continuously improving west coast travel experience that consistently exceeds customer expectations and reflects the innovation and pride of our employees”

CORE VALUES

Safety

Ensure that the safety and security of our customers and staff is a primary concern in all aspects of doing business.

Quality

Be motivated by customer expectations in providing quality facilities and services.

Integrity

Be accountable for all our actions and ensure we demonstrate integrity in our business relationships, utilization of resources, treatment of our customers and staff, and in the general conduct of our business.

Partnerships

Work openly and constructively with our various business and company stakeholders to exceed the expectations of our customers and advance each other's interests.

Environment

Ensure that environmental standards are maintained.

Employees

We will always deal from a position of honesty, mutual respect and integrity. We will ensure our employees are treated with dignity, and develop to their full potential.

Operational Training Vision: To continuously improve BC Ferries Operational Training programs by anticipating changing regulatory requirements and employees' needs, while leveraging leading-edge adult education principles, and doing so in the most sustainable and effective way practical.

Operational Training Mission: To provide world-class, sustainable and comprehensive training and education solutions that meet or exceed both employees' and the company's operational training and regulatory requirements.

1 The Learning Organization

2 Your Audience

Background Knowledge

Having some knowledge of your audience enables you to be more effective in your delivery.

Knowing others' affiliations can help draw out perspectives and experiences relative to case studies, and put the training in a real-world context. Determining the training needs of your class will assist you in customizing your course delivery to your audience.

Prior to your training session, Operational Training will provide you with a class list. This class list will include Name, POA (Point of Assembly or work location), Position and Benefit Group (seasonal, casual, regular).

These details can provide you with a lot of information. Individuals come with a different perspective and point of reference based on their own work location. The role of an employee in the company will also form their perspective for the training. For example, the level of knowledge and expectations could be quite different between a Ticket Agent and a Deck Officer. They could each be looking for very different outcomes from their training. Also, new employees may require additional information on the various topics, as they have not had the same level of exposure to the company and its processes and policies.

Your training material has been designed with a variety of learning activities that will allow you to reach the different needs of each student in your class.

Get to Know the Participants

During the introductions in the **first hour (6)**, record the names of all individuals and where they are seated on a piece of paper in front of you.

As students introduce themselves, listen carefully and make notes about each student. Refer to these notes when you address individuals to help you remember their names and backgrounds; using the names of your participants creates a positive learning environment quickly.



If your training is not happening in a classroom, it is still important to make some quick notes about each student for yourself, that you can refer to throughout the course.

Knowing the geographic mix of the audience and their work perspective will help you relate your material to participants' work situations. You may be able to draw out experiences with local issues which will be of interest to the entire group.

Know The Audience

- affiliation
- position/duties
- geographic origin
- familiar names

2 Your Audience

3 Instructional Goals – Learning Outcomes

The **instructional goal** is the overall goal of the training.

The **learning outcomes** are the various items a participant should be proficient in following the training.

For example, in Passenger Safety Management training:

One of the learning outcomes of this program would be “to demonstrate the use of personal life-saving appliances”. The successful completion of this skill, combined with all other learning outcomes, will allow the learner to achieve the overall instructional goal of “each student being able to perform passenger control duties in a confident, knowledgeable manner”.

To ensure the instructional goal is achieved, a consistent, step-by-step presentation of the material is required. For this reason, trainers are provided with a Facilitator’s Guide. This guide includes the course overview and lesson plans, augmented by instructor notes. These lesson plans highlight the learning outcome, methodology used, materials used and time required to complete each activity.

State the learning outcome before each activity and state it again at the end to close the **learning loop (back cover)**.

Learning Outcomes	Methodology	Materials	Time
<ul style="list-style-type: none">Ability to demonstrate to passengers the use of personal life-saving appliances	<ul style="list-style-type: none">Instructions given verbally, supported by visual (PowerPoint)Demonstration by instructorPhysical practice by studentsCheck competence	<ul style="list-style-type: none">PowerPoint slide with key pointsLifejacketsEnough space for practical demonstrations and practice	15 min

First-Time Presentations

Follow the lesson plan closely and rely on the experience of the training developers. Note your observations and record the **time required (7)** for each activity. This information will be useful when combined with the feedback received in the **evaluation (18)**.

Making Adjustments

You will likely make minor adjustments to your presentation even after your first training delivery. However major changes should only be actioned under the direction of Operational Training. It is important that all students receive the same information to ensure integrity of the content and consistency throughout the fleet.

Encourage learner participation in discussions and activities wherever possible. Do not attempt activities beyond the trainees’ traditional comfort zones until you’ve developed a relationship of trust and respect during the critical **first hour (6)**.

3 Instructional Goals – Learning Outcomes

4 Facilitator's Toolkit

Facilitator's Guide

Your Facilitator's Guide is designed for ease of facilitation; it allows the Facilitator to work from one guide only, rather than flipping back and forth between the Facilitator's Guide and Participant Workbook.

A course overview:

Provides information that is important for the successful delivery of the course including pre-requisites, course structure, required course materials and instructional tips for customizing courses.

Lesson plans:

Show the course topics and timeframes, as well as a lesson preparation checklist.

Instructor notes:

Includes instructional activities, tips and notes. Instructional activities are emphasized through the use of **training icons (11)**.

Appendices:

Located at the end of the Facilitator's Guide, matching those appendices contained in the Participant Workbook.

It is your responsibility as the trainer to remain up-to-date on the material you present.

Materials

All of your training materials are available through your Operational Training (OT) office. This will include your Facilitator's Guides, any DVDs, documents or props you will require. Use a list and ensure you gather all of the required items before the training day.

Preparation Time

A specific amount of time will be allotted for your preparation and setup time. The time can vary from one hour to one day, depending on the program, and will be approved by your Operational Training Advisor. You should also do any necessary photocopying during this preparation time.

Boards and Flip-charts

Whiteboards and Flip-charts are available in some training facilities. Please pre-book these items, as well as paper refills and appropriate stationary items through your OT office. Use dry-erase markers only for white boards. If a permanent pen is used accidentally on a whiteboard, use a cola-type drink or window cleaner to remove writing, or overwrite the perma-pen with a dry-erase pen and immediately wipe dry. Print your daily agenda on flip-chart paper to allow students to refer to it throughout the day.

AV equipment

Company laptops, projectors, and wireless presenters are available through the OT offices. Please discuss confirmation of these items, in addition to necessary extension cords etc. prior to your setup day. Please see OT for assistance with presenting a **PowerPoint presentation (20)**.

Other Equipment

As a facilitator, you know the items you will need to make your delivery a success. As well as the standard equipment for your course, think outside the box and add a simple game or a prop that will enhance your course.

Rewards

Purchase a supply of small wrapped candies or healthy snacks to be used as rewards in your class. Use these items throughout the day to acknowledge the contributions of the participants and to maintain enthusiasm for a topic. All participants should receive a treat at some point during the day. Invoices may be submitted for reimbursement.

4 Facilitator's Toolkit

5 Training Environment

Know your training environment, whether it is a classroom, a vessel or a temporary training site. Use your “prep time” to inspect your training environment and plan your setup.

Room Setup and Seating Arrangements

Complete the setup the day before the class starts or arrive early on the training day before any students arrive. The room should be set up prior to any students arriving. In a classroom environment, arrange the seating so students face away from doors and windows to minimize distractions. Ensure every student can see you. If utilizing a vessel, always ensure the onboard supervisor is aware of your presence and of the facilities you will be using.

Temperature and Noise Control

Locate temperature controls and find out if windows and doors can be opened for air circulation. If thermostats are locked, find out who can adjust them and how to find these individuals. A cool room is better than an overheated one. When a program is being conducted in an Operational area, dealing with noise distractions may be a problem. Identify all noise sources and eliminate or minimize as many as you can.

Lighting and Electricity

Test lights and power outlets for A/V equipment. Ensure that you can darken the room sufficiently to show slides. Know switch and breaker panel locations and mark key light switches with tape if necessary.

Walls

Ensure that you can use walls for posting flip-chart paper and graphics. Always use masking tape and water-soluble ink pens. Be careful when removing masking tape to ensure the wall covering is not damaged. Do not use pins.

Refreshments

Check with your Operational Training Office to determine whether lunch will be provided. Some of our facilities have coffee makers. Ensure you know how to use the machine, and have gathered all of the coffee supplies.

Information for Participants

Participants are notified for their training via a Participant Info Sheet which gives them all the pertinent details for the course. It is your responsibility to advise students of the emergency exits, location of washrooms and other location-specific information at the beginning of the training day.

Housekeeping Items

Be sure to mention these:

- Where are emergency exits?
- Where are fire extinguishers?
- Where are the washrooms?
- Where are smoking areas?
- Where are telephones?
- When are the breaks?
- Turn off cell phones, pagers, and PDAs/Blackberries.

6 The First Hour

The success or failure of your training session is greatly influenced by the impression you create during the “critical first hour”, as some call it. People are willing to learn with you and from you if they feel that you are organized, that they can trust you, that you respect their values and opinions, and that you “know your stuff”.

Know your audience (2) and dress accordingly. Make sure your uniform or “business casual” attire is appropriate to the training you are conducting and is clean and pressed. If you are uncertain what to wear, please discuss with your Operational Training Advisor.

Introducing yourself

Limit your introduction to 2 to 3 minutes. Provide a brief personal background which builds your credibility, however, do not try to impress with professional achievements or titles. Explain how you became involved with this training and give participants reasons to trust you and be comfortable with you. Recalling a short, funny **anecdote (18)** quite often establishes a relaxed environment.

Organization

Be organized. You may lose credibility early by not being prepared prior to the first students arriving or by fumbling with your material or AV equipment.

Trust

Be approachable during breaks and especially before the session begins. Some learners may arrive early for seating and others may have wanted to avoid the traffic. Using the time before the session begins to establish relationships with these individuals and will make start-up less stressful for you and for them.

Respect

Ask the participants to voice their views and opinions and to take in your presentation critically. Listen to their views and respond objectively. You may also turn a question or criticism back to the entire group and ask for their feedback. Do not attack participants personally for their opinions and deal with **conflict (16)** calmly. Do not embarrass anyone; what you may consider humour and good fun could be insulting to others.

Expertise

Admit that you don’t know it all and that you will try to get answers to any unresolved questions before the end of the session. If you cannot find answers before the session ends, commit to get back to the group with answers to their questions.

Parking Lot

Create a “parking lot” on a sheet of flip-chart paper that you can use to record comments and questions that are not related to your topic and should not be part of your classroom discussions. Make a commitment to pass along these comments and questions to the appropriate person within the company, and then bring the class back on topic. This will assist in keeping the class on topic.



6 The First Hour

7 Time Management

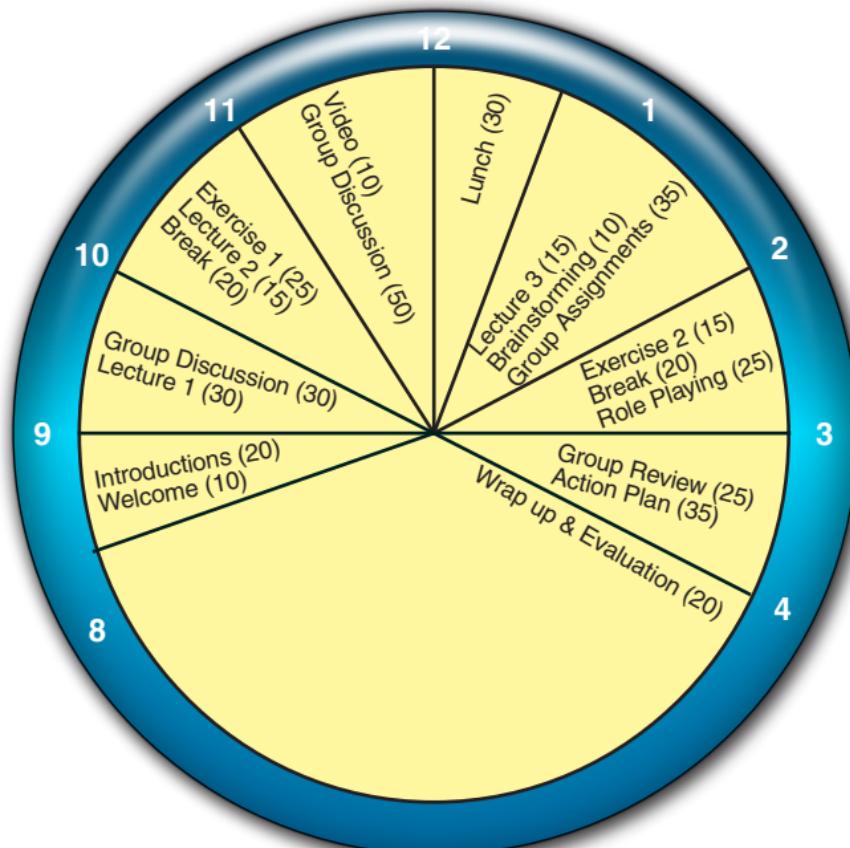
Managing the time in your day can be a challenge, especially for a new trainer. In order to stay on track and meet the learning objectives of the course, use your lesson plans as a guide. The time guidelines are designed to help you stay on schedule. You can adjust these recommended times slightly in order to make up time if necessary.

When conducting training on board a sailing vessel, you need to pay special attention to the ship's schedule. Plan breaks for turn-around times and ensure students are dismissed by disembarkation time.

Timing Tips

- In your lesson plans, allow a bit more time than you think is needed for each lesson, until you are familiar with your material.
- Record the time it took to complete a lesson. This will vary from session to session depending on the dynamics of the group but will give you a benchmark.
- Follow your Facilitator's Guide and do not add in additional activities that will cause you to fall behind.
- Prepare the agenda and time schedule on flip-chart paper and post it at the start of the day for everyone to see.
- Avoid altering timelines at the beginning or end of the day. If you have to cut something, adjust in the middle of the day. Introduction, wrap-up and evaluations are critical to the success of the course.
- If you get behind, you can modify an activity or change your presentation style.
- Set strict timelines for group activities and give clear directions. Nominate a timekeeper within the group to keep things on track. Check in with each group to ensure each group meets the set objectives and stays on time.

All students must stay for the duration of the training program. If a student needs to leave early, they must get permission from the Operational Training Advisor or Manager prior to the course commencement.

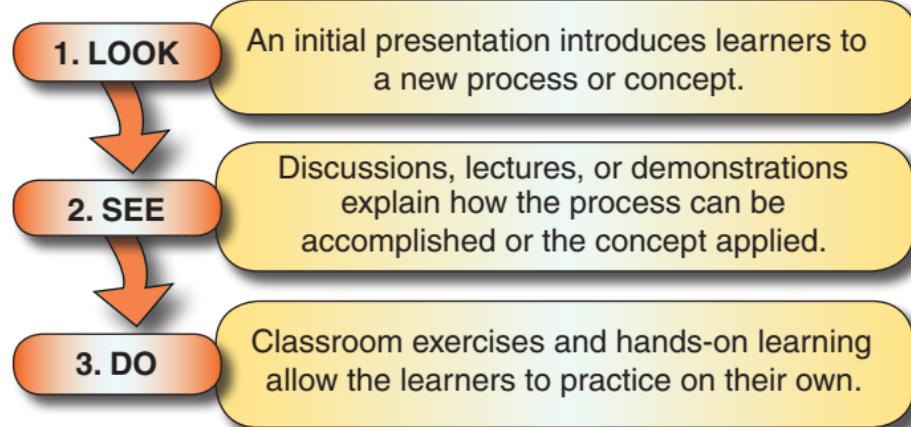


7 Time Management

8 Presentation Styles and Skills

The “Look-See-Do” Concept

This basic learning approach consists of three steps:



The best training involves a balance between lectures, classroom discussions, activities and learning aids to achieve the instructional goal.

Lecture Presentations

Lectures are often used to introduce a new idea or process and frequently contain large amounts of information. Without interaction, there is a risk that the presentation becomes teacher-centred and that the trainees will exhaust quickly and not absorb much information. Keep lectures short and concise and have frequent short breaks instead of one long one. Be aware of low energy times during the day.

Class Participation

This style requires the instructor to engage learners, allowing and encouraging them to participate in discussions and activities. While you give up some control, you generate energy and enhance the students' learning.

Take advantage of the experience and knowledge of your students and use group discussions and demonstrations to allow trainees to learn from each other.

Improve your Presentation Skills:

- Practice your delivery to a friend or family member.
- Ask your students for feedback – “can everyone hear me”?
- Modify the intonation in your voice – shake it up a little – avoid being monotone.
- Make eye contact and smile. Do not concentrate on a few people, include everyone.
- Provide opportunities for others to speak.
- Respect personal space.
- Remove distracting behaviours such as clicking a pen or saying “uh”.
- Circulate around the room and always speak to the audience.
- Do not read your presentation.
- Do not put your hands in your pockets.
- Review the evaluation forms with your OT Advisor and strategize for ways to improve your delivery.
- Review the information you learned in your ***Train the Trainer*** course and apply it in your session.



9 REMOVED

**REMOVED
TO MAKE ROOM FOR
REPLACEABLE PAD**

9 REMOVED

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(Back of 9)**

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10a BC Ferries Trainer Policy

As a Company Trainer we want to ensure you understand your role and responsibilities, and the guidelines that apply to Trainer selection and compensation.

Below you will find excerpts from the Company Trainer Policy.

The complete Company Trainer Policy may be viewed at:

http://www.bcferryssacademy.com/operational_training/becoming_a_trainer.aspx

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Trainer Support and Reporting Structure

- Trainers report to the Director of Operational Training (OT) or his/her designate. A local Operational Training Advisor will be assigned to each trainer as a “trainer advocate” and will be the primary point of contact.
- Operational Training staff will organize and communicate training assignments to trainers. The trainer should then review their overall schedule with their local Crewing office to confirm a balanced schedule. Trainers will liaise with their OT Advisor for direction and guidance for all training activities.
- Trainers will receive the Company ***Train the Trainer*** program. Other opportunities to develop training skills may be available through formal courses, seminars and resource material.
- Support for trainers will also be available on the Training Academy website. The site provides links to internal and external resources, the training schedule and other useful material.
- Training programs and trainers will be audited by the Operational Training Group, Line Managers, Peer Auditors and Company auditors. These audits will provide feedback in the following areas:
 - Preparation and organization;
 - General communication skills, including effective questioning techniques;
 - Effectiveness of presentation;
 - Effective use of various resources;
 - Comprehension of subject matter;
 - Completion of all lesson plans within the suggested time frames;
 - Interactions with students;
 - Practical application of lessons for students;
 - Assessment and evaluation of student learning; and
 - Classroom management.
- Student evaluations will be submitted to OT who will in turn review with the trainer. In addition to formal audits, trainers can expect to receive ongoing feedback and coaching from Operational Training.

10b BC Ferries Trainer Policy - continued

- Listed below are some of the performance management criteria Company Trainers will be assessed against:
 - Demonstrated commitment and support to the Company's direction and policies, not only when they are training, but also in their everyday duties;
 - Comprehensive knowledge of subject matter;
 - Working knowledge of the English language, both written and oral;
 - Ability to deliver technical information and training sessions by communicating ideas and information that is easily understood;
 - Working knowledge of the principles and methods of adult learning and instruction;
 - Ability to work with limited direction and supervision;
 - Ability to accept feedback and direction; then to modify and improve performance; and
 - Ability to establish and maintain working relationships with clients and co-workers.

Travel Expenses

Trainers will be compensated for travel expenses over and above what they would have normally incurred. This may include the following items as outlined in the Collective Agreement:

- Differential mileage;
- Meals while on travel status;
- Accommodations;
- Travel time outside their own community area; and
- Telephone and parking charges.

Please submit your form to your local OT Advisor.

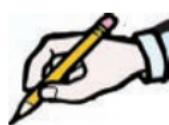
The Operational Training team is available for you. We want to ensure you have the support and guidance you need to succeed as a trainer. Please do not hesitate to call us!



10b BC Ferries Trainer Policy - continued

11 Training Material Icons

These icons are the standard in BC Ferries training material. Being familiar with them will enable you to effectively guide your students through the material.

Training Icon	Description
	This symbol denotes a key point. Please pay close attention to this important point.
	This symbol denotes a warning or caution. This is important information or training around tasks that you “should not do” or “be very careful doing”.
	This symbol denotes that, as a facilitator, you should expand on the training point and provide additional information from your field experiences.
	This symbol is used to denote when a class room discussion should occur.
	When you see this symbol, it is time to lead participants through hands-on practical component of the training.
	This symbol denotes a Question & Answer session.
	This symbol denotes that it is time for participants to watch a video, DVD, or listen to an audio CD.
	When you see this symbol, it is time for participants to complete a hand-written exercise to allow you to test their knowledge.
	This symbol denotes a demonstration by the trainer or the participant.
	This symbol denotes a test or examination that is mandatory for passing this course.
	This symbol denotes a Summary Checklist of items.

12a Paperwork and Admin

As a trainer, you are responsible for many administrative items including the gathering and completion of various documents.

Prior to the course, be personally prepared.

- Have you gathered all of the materials for your facilitator's **toolkit (4)?**
- Are you familiar with all of your materials?
- Have you confirmed your schedule with Crewing?
- If you need to travel, have you made those arrangements? Once you have made your hotel arrangements, your Operational Training (OT) Advisor/Coordinator will forward a Hotel Authorization form to your hotel.
- Have you touched base with your OT office to discuss any questions you have?

Operational Training staff members are available to assist you, but each trainer is responsible for their own legwork and preparation.

Set up Time – Get ready

- Wear your employee ID at all times when setting up and conducting training.
- Photocopy any necessary items.
- Obtain a class list or sign-in sheet from OT.
- Gather blank evaluations forms & pencils.
- Pick up student certificates (only applicable for some courses).
- Set up the classroom or training area.
- Set up and arrange your training space.
- Post your agenda and “parking lot” sheets.
- Gather your coffee supplies.
- Prepare and test equipment and supplies.
- Set up and test audio visual equipment; you may need an extra extension cord
- Are you familiar with the “rules” in your training location such as parking restrictions and location specifics guidelines?
- Your course may have special administration items for the students to be aware of, such as the requirement for a Transport Canada certificate endorsement. Ensure you have information ready for your students.
- The SEA training programs have additional administrative requirements. Please refer to the Sea website: <http://learning.bcferry.com> or your Facilitator’s Guide.

On the training day – Starting out

Everyone's time is valuable, so respect those who are punctual by starting on time.

- Be ready before the students arrive so that you can greet them and chat with them
- Have everyone sign in on your class list or sign-in sheet
- If you are training on a sailing vessel, report your class size to the Chief Steward or bridge, to add to the passenger count
- If you have a “no-show”, please contact OT immediately. This is important.
- If in a classroom, have the students write their first name on a tent card and place in front of them
- Make students aware of their role in completing an **Evaluation Form (18)** during the day.

12a Paperwork and Admin

12b Paperwork and Admin (continued)

On the training day – Before your day is done

Timesheets

On a perfect day, you will have the class timesheet prior to the class. If you don't receive a timesheet prior to the end of the course, you may use the classlist or sign-in sheet to record the following information.

- Confirm attendees; we need to know who was there.
- Hours – record the exact start and finish time of the course. If for some reason you finish a bit early, nobody will lose any pay – it is simply a point of reference for accounting items such as travel time etc. Make sure you have recorded your start time.
- If you have out-of-town students who are travelling, record any travel information you have. E.g., "John caught the 0700 ferry from Swartz Bay".
- Trainers are paid for their lunch break time; students normally have an unpaid lunch break.
- Once you have recorded all of the requisite information, sign the timesheet (or classlist) and return it to the OT office for immediate processing.
- Please note fax numbers in the **contact info section (10)**.

Assist students to complete expense claim forms.

If the training is ***not at an employee's point of assembly***, they may be eligible to claim for:

1. Differential **mileage** (kms over and above their normal commute)
2. **Lunch**, if not provided. Breakfast and supper may be approved for those on overnight travel status
3. **Parking** – receipt must accompany claim
4. **Telephone** – applies to individuals on overnight travel status

Applicable rates can be found in the Appendix in the back of the Collective Agreement.

Other Admin Items

- Return all laptops, projectors, flip-charts and other equipment to the OT office. Double check the equipment list included with each AV item to ensure all of the associated cords are placed back into the correct carry case.
- Review evaluation forms, ensuring all of the course info is completed. Make yourself some notes from the feedback, and forward the evaluation forms to the OT Office.

Within three days of the course completion

- Connect with your local OT office to discuss the evaluations and set a plan in place to action improvements.
- If you have an expense claim to submit, complete and forward to your OT office within three days of the course completion.

13 Tips, Tricks and Time Out

The number one tip for a trainer is:
Be prepared.

Learn and review your material and practice in front of a mirror or with a co-trainer, family member or friend.

Knowing that you are well prepared will also allow you get a good night's sleep prior to your training day.



Additional tips can be found on the Academy website:
www.bcferryssacademy.com.

Top 10 Tips from Experienced Facilitators

1. Arrive early to ensure you are set up and ready to welcome your learners.
2. Rehearse your **introduction (6)** to reduce start-up anxieties.
3. Be prepared and have back-ups.
4. Stay with your learners, even if it means modifying your agenda for the session.
5. Pause often to allow your learners time to think and reflect – do not let **time mangement (7)** manage YOU.
6. Expect the unexpected.
7. Share **personal stories and anecdotes (15)** that are relevant and make you human.
8. Involve the whole group.
9. Make the learning **fun (14)**.
10. Do not forget the scheduled breaks and don't be afraid to add in a quick break to allow students to stretch.

Take a quick 2 minute time out or stretch break

Sitting causes blood to pool in the lower legs and feet, the hamstring muscles to tighten, and the back and neck muscles to become stiff. Stretching after sitting for a long period of time will improve circulation, loosen up tense areas and energize stiff parts of the body.

A few repetitions of simple and effective stretching exercises can refresh everyone. Remember to stretch in a relaxed way with focus on the muscles for 10-30 seconds; breathe normally.



Do Not Bounce
Do Not Stretch to the point of pain

14 Learning Activities

All BCF training material has been designed to utilize appropriate learning activities and learning methodologies to achieve the **learning outcomes (3)** stated in the lesson plan.

Introducing and Concluding Activities

Help learners complete activities successfully by introducing them thoroughly; you should:

- Explain concepts and expectations.
- Share written resources.
- Demonstrate skills where appropriate.

Once the activity has started, assess progress and success:

- Give feedback during the exercise.
- Be available for individual or group questions.

Once the activity is completed:

- Lead a debriefing.
- Discuss the exercise; encourage participation and include contributions from each group or individual.
- Ensure that you close the **learning loop (back cover)**.

Forming Groups

Learners embrace and enjoy learning activities more when they are working in groups. When you break the class into smaller groups, if possible, ensure a good mix of age and experience level within each group. You can use random exercises to break people into groups: by numbering them off, or distributing specific playing cards (by clubs, hearts, diamonds etc).

Make Learning Fun

No matter what your content, it is important to build some lighthearted fun activities into the learning process in both small groups and the large class. Your participants will enjoy games, exercises, and quizzes, and the laughter these generate can help stimulate the brain, improve retention, and enhance the learning process. These exercise can also be used as a crowd breaker, to relax a group, or simply change the atmosphere.

Although your Facilitator's Guide will include ideas for these fun activities, you can use resources found in the Academy Library to add more fun ideas to your course delivery.

Fun learning activities may include crossword puzzles, jeopardy-style quizzes, trivia games, hangman, logic problems, brain teasers, scavenger hunts, pictionary.



15 Openers and Closers

A successful opener creates the beginning of a positive learning environment. This is your opportunity as a trainer to create learning motivation for your class. Welcome the class, and explain the high level learning objective. Follow this by stating the positive benefit for each student. For example, “Once you have completed this class, you will be very confident in managing passengers in an emergency”. Each student needs to identify a positive outcome for them personally. Your Facilitator’s Guide will also assist you with ideas for your opening statements.

Introductions

Once you have **introduced yourself (6)**, ask participants to introduce themselves. Have them share their name, position, work location and years of service with BC Ferries.

You may also consider having individuals interview their neighbour and have them introduce each other.

Course Objectives

Ensure that the course objectives are clearly stated for students. You may list these on flip-chart paper and post on the wall.

Personal Application

If you have a personal story that illustrates how this training has benefited you personally, you may chose to share it with your class at this time. You may even recall a personal experience related to the training topic where the results were not what you had anticipated. Don’t be afraid to be show your human side – but make sure you balance that with your knowledge as the subject matter expert. This will foster trust and respect.

Headline News

If you find a story in a daily newspaper relating to the training topic or a local issue, and you can personally add to the topic, talk about it briefly and ask for feedback from the audience. Once again, the intent is to bring you closer to the learners and create a personal relationship. Stay away from political or social issues.

Group Openers

You may also choose to have the group participate in an introductory activity. While helping reinforce your course objectives, the group work will also serve to help the students get to know each other better.

Closers

Closers summarize instructional goals and learning loops taught during the course. You can accomplish this with a formal summary in a lecture style or a series of quick questions followed by short, snappy answers by the participants. An all-encompassing group activity works very well but may be too time-consuming. The closer should always provide participants with a sense of accomplishment and closure, as well as an opportunity to comment on the training, before they complete a written evaluation form.

16 Communication

Listen to what others say and ask others to do the same when someone else is talking. Do not plan your response while the other person is making a point or presenting an argument.

Articulate your points and **questions (17)** well, and express your thoughts in a precise way; ask others to do the same. Speak loudly enough that everyone can hear you in the back of the room.

Avoid jargon and language that is inappropriate for your audience. Do not use acronyms without explaining what they mean, or language that is overly technical for the participants. BC Ferries language is full of acronyms, so pay special attention to this in your session.

Challenge the learners from time to time. Help them to think beyond their point of reference and stretch out of their comfort zone.

Treat fairly all participants, and do not give preferential treatment to anyone. This applies during discussions and learning activities. Focus your attention on all students in the class.

Respect the opinions and experiences of others. Remain neutral and objective when participants express strong opinions. Be factual and non-emotive and encourage other participants to do so as well.

Encourage quiet learners to participate; they may have as many valuable contributions to make as do the individuals who readily participate and express their opinions.

Dealing with Conflict

On occasion, a participant may be openly negative, and may seek an “audience” within the classroom to try to get his/her point heard. If the comments are not relevant to the class topic, or are destructive in nature, step in and take leadership of the discussion, and add any off-topic concerns to the “parking lot” to be addressed later. You may be firm, but never be disrespectful; this is your opportunity to show leadership, and to lead by example.

Classroom Management

Sometimes there will individuals in your group who demonstrate by their behaviours that the learning event is not meeting their needs. Others may be behaving in ways which are not in keeping with the goal of creating a positive learning environment. You should explore the reasons for the behaviours you are observing with these individuals in private. Engaging learners whose needs are not being met and striving to maintain a positive learning environment for all participants is a key role for you as the facilitator.



17 Questions and Answers

Questions are an integral piece of the learning process. Questions can be an outward sign of engaged learners. How you address learners' questions will affect the overall success of the learning experience. Questions can also be used by the facilitator as a tool to encourage participation and draw out information from the students.

Timing of Questions

Near the start of each section, let the learners know whether you will be answering questions as you proceed through the lesson, or whether they should hold their questions until you have completed the instruction for that section. This also helps participants to understand how you intend to present the material to avoid untimely questions. Prepare a flip-chart paper so that if there is a question that will have to wait, you can record the question. Say, "Thank you for the question. Let me write this down so we can get back to it a bit later."

Let everyone have a chance to ask questions. Do not let individuals control the session, or let questions pull you too far away from the topic or agenda. If you feel the topic has been adequately covered, and questions are taking too much time, indicate that you will take one or two more questions and then move on. Ask participants to see you during coffee break or after the session if they have further questions.

Answering Questions

When a participant asks a question, ensure everyone in the room has heard it. It may be necessary to have the student repeat the question. Once you have responded, check back with the person who asked the question to ensure that the response was satisfactory and to allow for further related questions and comments.

Never make up an answer. If you do not have the answer, just be honest and say that you do not know. You cannot be expected to know everything. Tell the class that you will get an answer during the next break by contacting a resource expert and will pass on the information to the learners. Even if you are unable to reach a contact person, you should still inform the group of your attempt, and commit to respond back to the group, either later in the training, or by email after the class. Those students who wish to receive a follow-up after the class can record their email address for you.

Asking Questions

Often it is effective to turn a question back to the audience to stimulate group discussion. Be prepared – this approach can lead to a discussion between individuals with opposing views. Your role is to facilitate these discussions; do not choose sides; remain neutral.

Your own questions may not always get a response. This does not necessarily mean that the participants do not know the answer; your question may not be worded clearly or effectively. Sometimes, you may need to wait a bit longer for the response; do not rush. Instead of providing the answer yourself, rephrase your question and wait for responses. Feel free to reward or praise active participants – either with a positive word, or a candy bar or similar treat.

Did you know?

- Tell someone and they'll forget.
- Show someone and they'll remember.
- Let someone do it and they'll understand.

Advice for Advisors, Swedish Forestry Institute

18 Feedback, Evaluation and Audit

Feedback and evaluation are key elements in determining the success of any training program and provide essential “gold-dust” for building better programs for future training. Our goal is to ensure the best training is delivered to each student, so by obtaining and responding to feedback, we action the first steps to continual improvements and “top notch” training.

There are several ways for participants to provide feedback.

Informal Feedback

All students should be encouraged at the start of the class to provide constructive feedback throughout the course. Letting participants know you are open to feedback will promote attentiveness and will also let them know that you are approachable and willing to be a “learner” as well. Allow time for this throughout the session. Explain why you are asking for feedback and what will happen to the feedback they provide. You may also wish to remind students of the best way to provide feedback.

Rules for Providing Feedback

- Give and receive with care.
- Be objective, not emotional.
- Be precise and to the point.
- Give feedback in small doses.
- Offer solutions.
- Really listen – you expect the same from others.

If you are instructing a multiple-day session, take stock at the end of day one. Have students share what was valuable for them and why; and solicit suggestions for change and improvement. This is your opportunity to see things through the eyes of your students.

Record all feedback and let your students know that their input is very much appreciated and will be discussed with the Operational Training Group with the intent to improve training.

Formal Feedback

In your course introductions, let students know that they will have an opportunity to complete a course evaluation to provide feedback on materials, content, facility and delivery.

During the day, when appropriate, give the students the BC Ferries Course Evaluation form. They can refer to the form and make notes throughout the course as ideas arise. You will also need to set aside a specific time near the end of the day to ensure that all of the forms are completed.

Note: Handing out evaluation forms five minutes before the end of the course may not provide instructors and course designers with useful information about the effectiveness of the training. Participants are not likely to take the time to judge the value of the event thoroughly when it is time to go home.

Gather the forms and read every comment – not just the ones that interest you. Reflect on the training day and discuss the feedback you have received with your Operational Training Advisor. They are there to coach you and assist you in any way they can. You will also receive feedback from any auditors who attend your **program (10b)**. The completed evaluation forms should be sent to your Operational Training Office who will review the information to make improvements to material and program details.

18 Feedback, Evaluation and Audit

19 Reflection

The Break in Breakthrough

In designing and delivering truly effective training, it is important to recognize that “break” is a big part of breakthrough, both literally and figuratively. Researchers looking into how the human brain actually solves problems now confirm what many artists and scientists instinctively know about the process of idea incubation: that seemingly unproductive times are a key ingredient of immensely productive and creative ones. (Matthew E. May, 2007)

The Art of Reflection

Today’s work culture promotes achievement and success, and in our generation that is usually portrayed by effort and hard work. We are so busy “doing” that we forget to look back and reflect in order to gain perspective and clarity. Essentially it is a paradox, because when we step away from continued activities and slow down to reflect, we are able to see beyond ourselves, make better decisions, and ultimately achieve our greatest successes.

Reflection in the Classroom

Reflection plays a dual role in effective training. During the training session itself, it is important to schedule mental breaks periodically throughout the training. This may seem counter-intuitive and you may fear the loss of momentum, but building in short periods of reflection allows participants a chance to absorb the concepts and methods they’ve just learned.

Reflection will be important for you, as a trainer. After the training session has ended and you have received feedback from your students, quiet your mind and reflect on the session. This can help you review the experience from the perspective of the learner and in so doing discover new ways to enhance the experience for your next group. Here, trainer becomes learner. Allow yourself the time to think about the session without judgement, and with a calm mind.

Ask yourself:

- Did the session meet your expectations? In what ways?
- What can you learn from the participants’ **evaluation(18)**?
- Were the **learning outcomes (3)** relevant to the needs of your participants and to the content of your course?
- Did you think you met each learning outcome? If not, why not?
- What worked? What didn’t?
- Are there ways in which the training package could be improved?
- Were there any uncomfortable moments during the session? If so, what can you learn from them?

It is important to reflect on the process, not just on the results. Even if your participants feel the session was a complete success and have only positive things to say, if you take some time for serious reflection, you will discover new ways to improve your training.

20a Delivering a PowerPoint Presentation

PowerPoint is one type of tool used to assist with the delivery of a presentation. A series of electronic slides is displayed directly from a laptop via a projector (also known as an LCD or Proxima). Never read directly from the slides (you don't want to put your class to sleep!) The slides do not speak for themselves; but rather act as a visual aid to support the broader topic you are presenting.

Equipment needed:

- The CD or memory stick that contains your presentation
- A laptop, including 2 cables and 1 mouse
- A projector, including 2 cables

Set up the projector and laptop

- Plug in the laptop and projector but do not turn them on.
- Connect the projector to the laptop.
- Connect the mouse to the laptop.
- If you are using the Intranet, connect the network from the laptop to the wall network port.
- Turn the projector on FIRST.
- Turn the laptop on NEXT, wait for it to boot up and then log on.

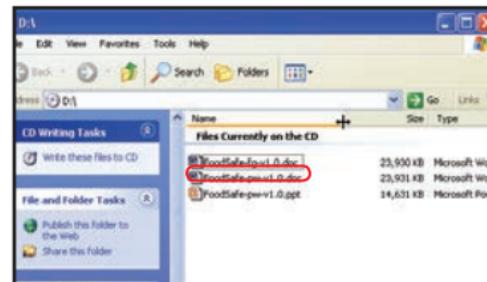
Insert the CD or stick into the laptop and locate file

- Place the CD (with the plain silver side down) in the drive OR the memory stick into the USB port of the laptop.
- Locate the PowerPoint Presentation on the window that appears.
- If you have trouble reading the file names, navigate to the **View** menu and select **Details**. Now, find your PowerPoint Presentation File. (PowerPoint files are recognizable by their .ppt file extension.)
- Open the PowerPoint Presentation from the CD by double clicking on the file name or by right clicking (using the right mouse button) on the file name and selecting OPEN from the options.
- Navigate to the **View** menu and select **Slide Show**, or press the **F5** key on your keyboard. The first slide will display on your laptop and on the projector Screen.

Navigate through your Presentation

Using the keyboard:

- **Next Slide:** press the **Page Down** key, **Enter** key or Spacebar on the keyboard, or click your mouse.
- **Previous Slide:** press the **Page Up** or **Backspace** key.
- **Specific Slide:** type the slide number and press the **Enter** key.

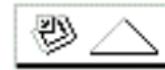


- Note: When NOT using the projector, put the projector into standby mode by pressing the Standby switch.
- Always lock the laptop and projector in the classroom if no one is there.

20b Delivering a PowerPoint Presentation

Using the menu:

- Open the menu by clicking on the **menu** icon or right clicking anywhere on a slide.



Using the pointers:

Choose the pointer you wish to use during the slide show by navigating to the menu and selecting **Pointer Options: Arrow or Pen**.

Log-off the laptop

- Log-off the laptop and turn it completely off before turning off the projector.
- Allow the projector to cool down by letting it sit until the fan has shut off.
- Turn the projector switch to the OFF position and then unplug it.
- Pack up the laptop, projector, and all associated cables neatly!
- Return the laptop and projector to the pre-arranged location.

**Remember, others may need these machines,
so return them promptly.**

Troubleshooting - What should I do if...

... I get a message on the screen that says “No Signal”?

- Check that all your cords are connected properly.

... nothing happens when I insert the CD?

- Left mouse click on the **Start** Menu of the laptop. This is found at the bottom left hand side of the screen.
- Left mouse click **All Programs**.
- Left mouse click **Microsoft PowerPoint**. The program may take a moment to open.
- Once the program is open, left mouse click **File** (located near the top on the left hand side of the screen).
- Left mouse click **Open**. A window titled Open displays.
- Browse to the location where your PowerPoint file is located.
- Remember, this is on the CD. Therefore, you will need to find the CD Drive.
- You can always recognize a PowerPoint file because it will have a .ppt extension.
- Once you have found the file, click on it and click the **Open** button. Your presentation is now open in PowerPoint.

...the screen changes to a screen saver?

- If your laptop screen changes to a screen saver, simply wiggle your mouse (in any direction) to return the screen to the presentation.

...I type in my logon information and numbers and symbols are being displayed instead of letters?

- Simultaneously press both the shift key and number lock key on your keyboard.



You have received this handbook because you are a valued member of our Operational Training Team. This resource is designed to assist you in your role as a facilitator, and we trust that you will find it a helpful resource.

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Resources

IT Support

The HELP DESK can be reached at:

- 250-978-1234 or
- *SOS@bcferries.com*



Academy Website:

<http://www.bcferriesacademy.com>

Where you will find:

- Training Schedule
- Library
- Course information
- FAQs
- Career Path Info
- Other on-line resources



SEA website and Trainer Forum

<http://learning.bcferries.com>

If you do not have a username and password to access the full SEA website, please contact your local OT office.