

**MG&A**

**Systematic Instruction**

**Certification**

**Handbook**

**2019**

# MG&A

## Welcome!

Welcome to the Systematic Instruction Certification Process!

Now that you have completed the 3-day Gateway Training on Systematic Instruction and have decided to work toward certification, this handbook will describe the requirements and policies for certification. There are multiple resources and information such as SI Syllabus, webinars, and articles to support you, including your Mentor who will guide you through this process. However, it cannot be done without your active engagement, personal responsibility for learning the skills/knowledge and accountability for completing your work to performance standards within the 20-week timeframe. This is a performance-based certification in that you must effectively apply the Systematic Instruction process and demonstrate SI strategies, techniques and principles while you are completing certification. Systematic Instruction certification is about YOU developing and acquiring SI competencies.

For Systematic Instruction certification, the Coordinator is Pam Bossert of Austin, TX ([bossertpk@gmail.com](mailto:bossertpk@gmail.com)). Pam's background includes Special Education teacher, MG&A job trainer for employment projects for individuals with developmental or intellectual challenges at various corporations, Global Training and Development Manager at Motorola and MG&A Systematic Instruction training consultant.

You will be assigned a personal Mentor by Pam after your registration form has been received and the registration period has ended. Your MG&A Mentor will have 9 hours to Mentor you through the certification process. Be sure to read & understand the information in each section of the handbook. If you have concerns or questions discuss them with your assigned Mentor.

Successful employment for individuals with disabilities is the result of three comprehensive components Discovery, Job Development and Systematic Instruction. In Systematic Instruction certification, you will apply and demonstrate Systematic Instruction skills and knowledge to train an individual (s) with developmental or intellectual disabilities on job type tasks This includes effectively determining Natural Method to perform a job task, conducting Task Analysis, training a Learning Partner on job tasks using informing strategies appropriately and taking training data on Learning Partner performance. You will also complete a Job Analysis at an employer site and facilitate training your Learning Partner using the Seven Phase Sequence and balancing the needs of the Learning Partner and employer.

You must negotiate with your supervisors at work for the release time necessary to complete the activities that are required. You must communicate with your employers to assure that funding is available to support your work in successfully completing certification and also stipend for your Learning Partner. You will need approximately 45-50 hrs. over the 20-week period.

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## Systematic Instruction Requirements

To be successful with certification, you will need to fulfill the following requirements to the satisfaction of the MG&A Mentor.

1. You will be required to identify appropriate Learning Partner(s) to train on 2 types of tasks using Systematic Instruction and 1 task for the Seven Phase Job Analysis Sequence Simulation. You may have the same or different Learning Partner(s) for this training. You are required to identify an individual(s) with a significant intellectual disability and who is supported by your agency or locale. He/she must be someone who is interested in working, being a Learning Partner and qualifies for funding through VR and/or DD services in their state. It is helpful if they have completed the Discovery process however it is not required. MG&A recommends that you have a “back-up” individual in case your initial individual decides not to participate. Any changes with your Learning Partner must be reviewed with your Mentor before training begins. Please check with your Learning Partner(s) agency and acquire the required release of information forms so that information can be shared with Marc Gold & Associates. The release of information should specifically state Marc Gold & Associates. Mentors and the Coordinator will be reviewing all forms, so it is essential that we have permission to view the information required for certification.

At your initial meeting with your Mentor be prepared to discuss 2-3 potential Learning Partners, their interests, possible tasks to use for training, and any constraints the Learning Partner may have such as transportation, scheduling etc. Your Mentor may ask you to identify a different Learning Partner if the individual you selected is not appropriate based on the description above.

Your Mentor has a tool “Learning Partner & Task Selection Considerations” they may use if appropriate to help you in final identification of your Learning Partner(s).

**NOTE:** MG&A recommends compensating Learning Partners with stipends based on the prevailing minimum wage in your area for the time they work with you. Stipend for Learning Partner(s) is not provided by MG&A. The sponsoring organization/local agencies will determine if Learning Partners will receive stipends and if so the amount and process for payment and provide for payment.

2. You are required to complete the following forms:
  - a) Systematic Instruction Signature Page – form stating that you have read the handbook and agree with the requirements for certification.
  - b) Agreement to use MG&A Systematic Instruction Webinar Series - form giving you permission to view the webinars. This form is emailed to [marcgoldassociates@gmail.com](mailto:marcgoldassociates@gmail.com).

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3. You are required to watch the following webinars:
  1. SI History of Systematic Instruction - 1 hour 12 minutes
  2. SI The Seven-Phase Sequence - 37 minutes
  3. SI Method and Content – 29 minutes
  4. SI Types of Job Tasks and Job Analysis – 21 minutes
  5. SI Formats & When/How Much Information – 28 minutes
  6. SI Types of Instructional Assists/Where – 1 hour 3 minutes
  7. SI Teaching Episodic Tasks & Sequential Role Play – 1 hour 15 minutes
  8. SI Data Collection and Other Concepts – 1 hour 16 minutes
  9. SI Motivation vs. Reinforcement and Values - 1 hour 17 minutes

Discuss with your Mentor the sequence and timing for the most effective learning and application with other certification activities. The SI Syllabus and Activity Log specifies the order for viewing and are linked with specific certification activities. To further your understanding of the material take notes, and discuss and ask questions with your Mentor after viewing the assigned webinars.

4. Maintain regular communication with your Mentor. This can be achieved by phone calls, emails, SKYPE, etc. You and your Mentor should discuss the best time and ways to communicate and share information on a regular schedule. There is an expectation that your Mentor will respond to you within 48 hours. In order to promote the best learning for you, it is similarly expected that participants will respond to their Mentors within 48 hours. There may also be opportunities to participate in conference calls. These calls give you an opportunity to collaborate with other people pursuing certification in Systematic Instruction.
5. Actively follow and use the Systematic Instruction Syllabus and Activity Log. You must create a timeline to complete all requirements and effectively demonstrate application of SI skills and knowledge within 20 weeks. The SI Syllabus and Activity Log list the sequence of activities, the performance standard that must be demonstrated for each learning activity, materials to support you and help you stay on track for successful completion. The SI Syllabus and Activity Log can be found on the Marc Gold & Associates website.

When you have created your individual plan with dates to complete certification activities, discuss and review it with your Mentor. Use the SI Syllabus and Activity Log to reflect and record key learning, new insights, learning activities that you successfully completed and are approved by your Mentor, time to complete and dates for each learning activity. This must be updated and submitted monthly to your Mentor

A final SI Syllabus and Activity Learning Log is submitted to your Mentor when all certification requirements have been completed and successfully demonstrated to your Mentor's approval.

6. Read the four (4) articles as specified in the SI Syllabus. They are located on the MG&A website. The titles of the articles:

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“Seven Phase Sequence for Balancing Natural and Individual Needs”

“Systematic Instruction Strategies for Organizing Information”

“Systematic Instruction Training and Motivation”

“Job Analysis: A Strategy for Assessing & Utilizing the Culture of Work Places to Support Persons with Disabilities”

You will discuss the articles and how the information relates to the tasks and Learning Partner you are training and ensure understanding of the concepts.

You are required to use and complete the following forms for Systematic Instruction, which are located on the Marc Gold & Associates Website. These forms are:

Content Task Analysis Form

Task Analysis Data Form

Job Analysis Form

Samples for each form are available to assist you:

Sample Task Content Steps for a Core Work Task

Sample Task Analysis Data Form

Job Task Analysis Sample

7. You are required to identify and train 1 Core Task and 1 of the following Types of Tasks: Episodic or Job-Related. Train the two types of tasks to criterion with Learning Partner(s), demonstrating skills, knowledge and understanding of Systematic Instruction concepts, values, and strategies. Complete all required documentation and submit to Mentor for approval.

Identify and discuss with your Mentor possible job tasks that represent each of the 3 Types of Tasks listed above (Core, Episodic, Job-Related). Your Mentor has information available to help you identify tasks to develop your teaching skills and align with your Learning Partner(s) interests. These include a Career Cluster list and examples of tasks to help you think beyond traditional tasks taught to individuals who find it difficult to learn. You must have Mentor approval for the tasks selected to use for training.

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**Task Training Steps – Each Step must be reviewed and approved by your Mentor before proceeding to the next step. You may be asked to change, revise or repeat if it does not meet MG&A SI performance standard.**

- Step 1 Identify Task for Core task training.
  - 1.1 Submit job task to Mentor for review, discussion and approval.
  
- Step 2 Determine Method
  - 2.a Observe task being performed and determine the natural/typical method to perform the task.
  - 2.b Learn the task yourself using the Natural Method.
  - 2.c Video the Natural Method. Video must clearly show the Natural Method being performed by the natural employee/trainer.
  - 2.d Submit video of method to Mentor for review, discussion and approval based on the performance standard in the SI Syllabus and Activity Log.  
To ensure your Mentor knows who and what is submitted label the video with 1) Your initials 2) Type of Task 3) Name of Task 4) Method
  
- Step 3 Conduct a Task Analysis
  - 3.a Analyze the method, identify and write the content steps that accurately reflect the natural/typical method using the MG&A Content Task Analysis form.
  - 3.b Submit written Content Task Analysis to Mentor for review, discussion and approval based on the performance standard in the SI Syllabus and Activity Log.
  
- Step 4 Define Criterion Performance and complete Task Analysis Data Form
  - 4.a Determine criterion performance
  - 4.b Transfer the content steps identified in Step 3 Content Task Analysis, to the blank MG&A Task Analysis Data form.
  - 4.c Complete entire form with required information
  - 4.d Submit Task Analysis Data Form with Criterion Performance to Mentor for review, discussion and approval based on the performance standard in the SI Syllabus and Activity Log.
  - 4.e Discuss with Mentor plans for conducting the training trials; frequency, length, location, etc.
  
- Step 5 Conduct Initial Training session with Learning Partner
  - 5.a Demonstrate to Learning Partner how to perform the task using the Natural Method.
  - 5.b Using SI teaching strategies begin training your Learning Partner to perform the task. NOTE: Plan with your Mentor how many cycles/time should be completed for the initial training session.

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- 5.c Video your training with the Learning Partner doing the task during one of your beginning training sessions to record an early cycle of their learning the task. The video must show you training the Learning Partner, using the Natural Method, content steps and informing strategies and be clear for the Mentor to review and provide feedback.
- 5.d Record training data on your Task Analysis Data form completed in Step 4.
- 5.e Document how Systematic Instruction training strategies, principles and techniques were applied to organize information and provide information and support to teaching the task.
- 5.f Submit video of Initial Training and Task Data Form to Mentor for review, discussion and approval.  
To ensure your Mentor knows who and what is submitted label the video with 1) Your initials 2) Type of Task 3) Name of Task 4) Initial Training Trials #'s.
- Step 6 Continue training to mid-point learning/performance.
- 6.a Video your training with the Learning Partner after he/she has clearly learned some of the steps that will show a mid-point cycle of their learning.  
The video must show you training the Learning Partner, using the natural method, content steps and informing strategies and be clear for the Mentor to review and provide feedback.
- 6.b Record training data on your Task Analysis Data form.
- 6.c Document how Systematic Instruction training strategies, principles and techniques were applied to organize information and provide information and support to teaching the task. Note any changes in approach from the initial training cycle.
- 6.d Submit video of Mid-Point Training and Task Data Form to Mentor for review, discussion and approval.  
To ensure your Mentor knows who and what is submitted label the video with 1) Your initials 2) Type of Task 3) Name of Task 4) Mid-Point Training Trials #'s
- Step 7 Train until Criterion is reached--a cycle of performance that reflects criterion performance by the Learning Partner.
- 7.a Video your Learning Partner when she/he has met criterion performance.  
The video must clearly show the Learning Partner performing all steps topographically correct with no assistance to the defined criterion.
- 7.b Record training data on your Task Analysis Data collection form until criterion performance has been reached.

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- 7.c Document how Systematic Instruction training strategies, principles and techniques were applied to organize information and provide information and support to teaching the task. You will note any changes in approach from the mid-point learning cycle.
- 7.d Submit video of Criterion Performance and Task Data Form to Mentor for review, discussion and approval.  
To ensure your Mentor knows who and what is submitted label the video with 1) Your initials 2) Type of Task 3) Name of Task 4) Criterion Performance Trials #'s

Step 8 Repeat Steps 1-7 for a second type of task: Episodic or Job-Related.

To video your training sessions you must have another person video or use a tripod. Make sure the video clearly captures the training; your actions, the Learning Partner's actions. Your Mentor must be able to see what took place as if they were actually observing the training.

MG&A has prepared step by step videos on how to set up your Dropbox, make a video, edit and upload your videos to a Dropbox.

Dropbox - [How to use Dropbox](#)

Recording and Editing Videos Part 1 [Video on Recording and Editing Videos Part 1](#)

Recording and Editing Videos Part 2 [Video on Recording and Editing Videos Part 2](#)

How to Upload Videos Video on How to upload video

- 8. You are required to complete Seven Phase Sequence as described below.

You must conduct a Seven-Phase Sequence 1<sup>st</sup> Day of Work Job Simulation. Find a local employer who will allow you to conduct a Job Analysis of the business with a specific work task. Simulate the first day of work using natural ways, natural means, methods and natural people to train your Learning Partner using the Seven Phase Sequence. Complete all required documentation, submit to your Mentor for review, discussion and approval.

For this simulation, you will:

- A. Identify a local employer willing to have you conduct a job analysis and facilitate a simulated 1<sup>st</sup> day at work (30 minutes) with your Learning Partner.
- B. You may use a third party, such as a manager or agency job developer, to help you source and negotiate the employer's participation.
- C. Review and discuss with your Mentor the potential employer, how to complete a Job Analysis and the specific job task you are selecting; get approval to proceed.

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- D. Conduct a Job Analysis and complete the **Job Analysis form**, include a video of the Natural Method, task content steps, data sheet for the specific job task selected for the facilitated job training simulation. Work with the natural trainer to ensure you know how the task is performed using the Natural Method.
  - E. Submit completed Job Analysis with Natural Method video, task content steps and data sheet for the specific job task to be trained to your Mentor for review, discussion and approval prior to training.
  - F. Facilitate a simulated Seven Phase Sequence activity with the natural trainer teaching your Learning Partner at the employer site.
  - G. The Job Simulation should reflect the 1st day of work training on a specific job task based on the Job Analysis, utilizing the Natural Ways, Natural Means, and Natural People of the company to train your Learning Partner. Your Learning Partner should perform the designated job tasks for a minimum of 30 minutes.
  - H. During simulation, you will facilitate the training with the natural trainer and observe how they provide information to the Learning Partner and if you need to implement any of the back-up phases. A video of the training must be recorded, and descriptive notes of the 30-minute facilitated training session.
  - I. Submit your video and training documentation of the actual Job Simulation to your Mentor for review, discussion and approval. To ensure your Mentor knows who and what is submitted label the video with 1) Your initials 2) Job Simulation 3) Type of Task 4) Name of Task.
9. After each certification requirement has been successfully performed to standard and approved by your Mentor submit the following documentation on a thumb drive to your Mentor for a final review and approval:
- A. SI Syllabus and Activity Log with dates, total time & learning insights.
  - B. Core Task; Content Steps, Task Analysis Data Form showing criterion performance, and video showing Learning Partner criterion performance
  - C. 2<sup>nd</sup> task Training; Content Steps, Task Analysis Data Form showing criterion performance, and video showing Learning Partner criterion performance
  - D. Seven Phase Sequence Job Simulation; Job Analysis, Task Content Steps for job task trained, video of actual Seven Phase Sequence facilitated session and documented observations on how the Seven Phase Sequence was implemented in the simulation.

NOTE - VIDEOS will not be used for any other purpose without appropriate consent and permission from participant and Learning Partner.

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## Responsibilities of the Person Seeking Certification

It is your responsibility to read all documents given to you, including the handbook and Systematic Instruction articles, respond to all emails, phone calls, and watch all webinars. You should respond to any emails your Mentor sends to you within 48 hours. You should participate in all calls set up by your Mentor. Complete all required forms, documentation and task training with your Learning Partner and have Mentor approval. Make and submit all required videos to your Mentor. Any changes with Learning Partner(s) and tasks for training must be reviewed and approved with your Mentor before acting on those changes. You must make arrangements to video the sessions so the videos are clear, this requires either using a tripod or having another person video for you.

## Timeline for Certification

Please be aware that MG&A fully expects participants to complete the certification process within the 20-week timeline. MG&A does recognize that family/health issues do occur. MG&A has developed the following policies with regard to extending timelines for participants.

## Delayed Start

1. When a Mentor has made the first contact with you, you are expected to already have identified 2-3 potential Learning Partners to discuss with your mentor. However, if you do not have 2-3 Learning Partners, you will be given a two-week window to locate a Learning Partner(s) and review with your mentor. After that, MG&A will place you on hold until you have a Learning Partner--it is then your responsibility to let MG&A know when you have a Learning Partner. When you do contact MG&A, MG&A will then determine whether to grant permission for you to move forward. In no case, will permission be granted to continue if you have been on hold for six months or longer. The six months starts from the last day of your Systematic Instruction Gateway Training. Depending on the original Mentor's schedule and workload, you may or may not have the same original Mentor.
2. If you have registered for an additional area of certification but you have not yet completed the requirements for certification in your current area, it is possible to request a delayed start until you do complete the requirements in your current area of certification. However, you must start the additional area of certification within six months of that area's gateway training.

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### Systematic Instruction HOLD

This HOLD policy differs from the delayed start policy in that the participant has already started the process: i.e. viewing webinars, reading articles and contact with mentor.

You will have up to **four weeks from your official start date** to finalize selection of your learning partner and core task to train. Please note that this four weeks is part of your 20-week timeline—not an additional four weeks. After the four weeks if you do not have a Learning Partner or task, MG&A will place you on hold until you have a Learning Partner and task for training—it is then your responsibility to let MG&A know when you have a Learning Partner and task for training. When you do contact MG&A, MG&A will then determine whether to grant permission for you to move forward. In no case, will permission be granted to continue if you have been on hold for six months or longer.

The six months starts from the last day of your Systematic Instruction Gateway Training. Depending on the original Mentor's schedule and workload, you may or may not have the same original Mentor.

### Extension

If it becomes apparent to the Mentor that you will not meet the 20 weeks' deadline or if you are unable to meet the quality standards expected, the Mentor will make a decision based on MG&A timeline extension policies.

1. Reasonable exceptions to the timeline are: medical emergencies, family emergencies, health issues and issues with Learning Partners (moving, etc.) When the participant experiences any of these situations, extensions can be given, and no extension fee will be assessed. A new timeline will be established.
2. Supervisors at times will ask for extensions for participants because of unanticipated workload increases. We certainly recognize these unanticipated issues and will grant extensions based on these exceptions. However, the agency will be required to pay a \$75.00 extension fee per participant.
3. If you have been responsive during the process but have struggled and have begun to show a potential positive outcome and will need an extension to complete the process, an extension will be granted. However, you will be assessed a \$75.00 extension fee. If you have used all 9 hours of Mentoring, additional Mentoring hours will have to be purchased separately from the extension fee.
4. If you have not been responding to Mentor emails and haven't been turning in work in a timely manner and then find you cannot finish within the 20 weeks, an extension will not be given to you.

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5. MG&A does not recommend a participant pursue two areas of certification at any point during the same 20-week time period—each area's requirements are too extensive to accomplish in the same 20-week time period. Please realize that if you choose to pursue two areas during the same 20-week time period, time extensions will not be granted based on the pursuit of two certifications simultaneously.

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## Quality Performance

Participating in the certification process does not guarantee you will earn a certificate. You must meet MG&A standards as determined by your Mentor.

## Stopping the Certification Process

1. Participants who have not started the core task requirement by week ten (10) due to on-going lack of responsiveness to Mentors or repeated delays with requirements will be dropped from certification because there is not enough time remaining to complete the three major SI requirements to MG&A standards. This does not include delays caused by participant or Learning Partner emergencies.  
Starting the core task is inclusive of all of the following:
  - a) Identifying the task and obtaining approval from the Mentor
  - b) Completing the video of the Natural Method
  - c) Defining the content steps of the Natural Method and task data form
  - d) Submitting a video of initial training and training data to the Mentor
2. Participants whose core task requirement does not meet standards as defined by the requirements and the performance standards will be dropped after 3 attempts to make the necessary improvements and demonstrate SI skills/knowledge

If you are still within the 20-week timeframe but have used the 9 hours of Mentoring time provided in your fee and if the Mentor believes you are making successful progress, you or your agency may be charged an additional Mentoring fee of \$75/hour until you complete the process. MG&A monitors the Mentoring time and will contact you and your agency should we see this become a possibility.

**The Mentor will make these decisions based on MG&A's policy for extensions, your performance and your response to calls, emails, timelines and requested edits. The Mentor will also include the Coordinator of Systematic Instruction Certification.**

## Ethical Standard

MG&A provides you with manuals, samples of work to be performed, PowerPoint's and webinars to use as resources. Our goal is to provide you with resources that will enhance your opportunity for success. Please make certain that you do not copy information from our resources or from other participant's work and submit as your own work. If your Mentor does find an inadvertent plagiarism error, the Mentor will call your attention to the error and ask you to correct the form. However, if the plagiarism is major (copying entire sections, submitting someone else's work as your own), you will be dropped from the certification process without any refund and will lose the opportunity to seek further certification from MG&A.

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### Suggested Timeline

The following timeline for Systematic Instruction activities can be used in planning your activities, these times are estimates.

1. Phone calls, emails with Mentor	7 hrs.
2. Watch all webinars and read all articles	10 hrs.
3. Selecting Learning Partner(s) & making arrangements	5 hrs
4. Task Identification, training preparation, training – 2 tasks	15 hrs.
5. Seven Phase Sequence Job Analysis & simulation	8 hrs.
6. Editing and uploading of videos	3 hrs.
7. Submission of all final documentation and uploading	2 hrs.
Total hours	50 hrs.

Please sign the following page of this handbook and send to your Mentor to indicate your understanding of the requirements for this certification and your responsibilities in meeting these requirements.

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## Systematic Instruction Signature Page

Please Sign:

As an individual applying for certification in Systematic Instruction from Marc Gold & Associates, I have read and understand the requirements for certification and my responsibilities involved.

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Print Name

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Agency

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Signature

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Date

# Appendix

## **TIPS FOR SUCCESSFUL COMPLETION OF CERTIFICATION**

**Start early:** Begin to identify a Learning Partner when you submit your registration form for certification. Your Learning Partner should be someone who has an interest in obtaining employment. If the Learning Partner is school age, expect to meet with the building principal and the Director of Special Education to gain entrée into the schools. We suggest you do this early in the process, as you might have to undergo a background check.

**Explain the Process:** Ensure that your Learning Partner and the family understand the process and will commit to the entire process. This assists in completion of certification in a timely manner and avoids delays in having to identify a new Learning Partner mid-process and having to start over.

**Pay attention to the webinars:** There is a lot of information in the webinars that is meant to help you understand and be prepared for the certification process.

**Use this Handbook as a guide for what to do.**

**MG&A SI Syllabus and Activity Log:** Your Syllabus and Activity Log are set up to outline all the tasks, activities and competencies that must be demonstrated during the certification process. Please ensure that you are completing the requirements in each section. Please complete your activity log as you go through the process. **Do not wait until the end to complete this document.**

**Block out time:** Upon beginning the certification process, it may seem like 20 weeks is a lot of time to complete all the requirements of certification. The allotted time for completion is sufficient, however, there will be other demands (work, life, etc.) that you experience while going through certification. If you don't specifically block out time to complete all your requirements, you will soon find that you have not completed certification within the timeframe and will run the risk of not becoming certified. Also, keep in mind that your Learning Partner is someone who has expressed an interest in obtaining employment. You want to remain aware of the fact that how you spend your time will have an impact on this person.

**Use your Mentor for support:** If you are unsure how to proceed or how to record your data, contact your Mentor to seek support.

**Photographs and Videos:** Videos and/or photos are required throughout the certification process. Please take time to ensure videos and photos represent your Learning Partner in a respectful manner.

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**Self-learning**: Adult learning can be challenging while working if you don't prepare yourself and remain organized. Your assigned Mentor can help you establish timelines and due dates, however It is up to you to stay focused and make sure you complete your work on time. Your Mentor IS NOT responsible for reminding you of deadlines and following up to ensure your work is completed.

**Quality**: It is important for MG&A to maintain the integrity of the certification process. Certification is based on a combination of completing all required tasks as well as meeting MG&A quality standards which is determined by your Mentor.

**Communication**: Respond to emails in a timely manner and actively participate in conference calls. You should always feel comfortable talking to your Mentor about any issue impacting your progress, such as confusion over content, illness, etc. Remember, that although Mentors are there to support and guide you, their time is limited to seven hours per participant. Please be responsive to their feedback and requests. Open and regular communication is critical to your success.

## Systematic Instruction Key Terms

### Types of Tasks

**Core work tasks-** tasks, assigned by the employer, which have no significant time delay between cycles of performance. *Example: Stocking shelves, Entering data*

**Episodic work tasks-** tasks, assigned by the employer, which have a significant time delay between cycles of performance. *Example: Changing a saw blade, Adding toner to a copier*

**Job-related tasks-** These are job duties or routines that are typically not a part of a job description, which by their nature, have a significant time delay between cycles of performance. *Example: Clocking in to start a shift, or eating lunch*

**Sequential Role Play-** This strategy involves setting up approximations of the situation/task in a sequence that starts artificially and ends up as close to the natural conditions as possible. (This format can be used when the natural setting does not provide or allow an appropriate context for direct instruction.)

### Additional Considerations when teaching episodic and job related tasks

**Natural Cues-** Any naturally-occurring aspect of a task or environment which provides information for correctness. *Example: Signs in an airport, The actions of others.*

**Natural consequences-** Refer to the resulting outcomes whenever one does not correctly respond to natural cues when performing a task. *Example: Someone honking when you sit through a green light. Walking into the wrong restroom.*

#### ***Natural consequences may be:***

- **Assisting:** results in additional natural support to continue the task successfully
- **Neutral:** causing the task to be interrupted, but causing no harm to the Learning Partner
- **Negative:** causing harm or embarrassment to the Learning Partner

**Method** - the way in which a task is typically performed in a natural work setting, *and*, the trainer's conceptual standard for correctness. Method is primarily an image of performance that a trainer obtains from carefully observing employees doing their jobs. The trainer then compares the performance of the Learning Partner to this mental image of correctness to determine when there is need for assistance

**Content Steps** - refer to the sequential actions necessary to perform the method of the task

**Content Task Analysis or Task Analysis** - To determine content steps, observe natural employees performing the method and break down the performance into *steps*.  
\*A *step* relates to a discrete action or set of related actions

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Hints for writing content steps:

- *Describe the action* you see in your head
- Start with an *action verb* that describes the action
- Keep the description *succinct*
- Use the *terminology of the workplace*, when possible
- Describe the action from the perspective of a “*typical employee*” of the setting

**Natural Content Steps** - are those, which would be applicable to an "average" employee in a work setting

**Correctness** - The degree to which an employee's performance of a task matches or differs from the **method** (the typical performance expected in a natural work setting)

- **Topographical Correctness:** Performance of a step(s) of the method in the manner that it is naturally performed in a setting, cycle after cycle.
- **Functional Correctness:** Performance of a step(s) of the method in a manner different than the way it is naturally performed in a setting, but the final outcome is correct.
- **Error:** Performance of a step(s) of the method in a manner different than the way it is naturally performed and/or the final outcome is incorrect.

### Training Strategies

**Cycle Constancy** - The topographically correct performance of the steps of the method, cycle after cycle.

**Timing** - the training strategy of offering information for correctness **after an incorrect decision has been made** by the Learning Partner but **before it is acted upon**. This strategy avoids the necessity of correction.

**Correction** - providing information on correctness after the Learning Partner has made an error. **MGA encourages trainers to use timing rather than correction.**

**“No News is Good News”** - is a training strategy that uses silence by the trainer as an indicator of successful performance by the Learning Partner.

**Self-correction**- is a training strategy that allows trainers to determine whether a Learning Partner can recognize and correct an error that has been made during performance.

### Ways to give information about correctness to the Learning Partner

**Demonstration** - involves the performance of the method of the task by the trainer or another employee for purposes of providing overview information to the Learning Partner and to let the Learning Partner see what is to be expected.

**Verbal** - The use of verbal information involves talking to the Learning Partner to provide the information necessary for correct performance.

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**Gesture** - Gestures involve the trainer using a finger, pencil or other object to point at the area of intended action by the Learning Partner. Since gestures do not involve language, the Learning Partner does not have to process verbal information into action.

**Modeling** - A modeling assist involves the trainer imitating the correct movements of the task using hands, fingers or bodily movements.

**Physical assists** - Physical assists involve touching or gently manipulating the Learning Partner for purposes of providing information on performance of a step or steps of the task.

**Demonstration during performance** - This type of assist involves the trainer stopping training and intervening with a demonstration of a step or steps of the task.

**Side by side performance** - This assist involves the trainer performing the task, or steps of the task, alongside the Learning Partner as the Learning Partner performs the task.

### **Data Collection**

**Recall data collection** - involves setting a timeframe for recalling data, such as 15 or 30 minutes, training without collecting and then halting the training and as accurately as possible, recall the Learning Partner's performance.

**Probe data collection** - involves setting an upcoming cycle of performance as a data probe, often at intervals of 10 – 15 minutes, training during that cycle and immediately recalling the data at the end of the probe cycle.

**Criterion** - is the point at which the trainer presumes that the Learning Partner has acquired the task. It involves topographically correct performance of the method, cycle after cycle, until the trainer's determined level of correctness is reached (usually set at a % of perfection).

### **Job Analysis**

**Job Analysis**- a process involving visiting a work site, observing tasks being performed, having the natural people train you on the task... The process is used by trainers to understand the unique culture of workplaces necessary to implement the first three phases of the Seven Phase Sequence. Information from this process is collected in a **Job analysis form**.

### **Additional Consideration for organizing how much, when and where to teach**

**Formats**-is the final consideration in the organization of information to be trained. It addresses:

- a. How much information will be offered to a Learning Partner at one time?
- b. In what order the information will be presented
- c. In what context will the training be provided

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**Total Task** - Presentation by the trainer to the employee of all the steps of the method in the sequence in which they naturally occur.

**Clusters** - This strategy can be used when the natural cycle of the task is too long for Total Task. Portions of the task are sub-divided into smaller total task formats. Those portions are then chained back together to form a total task. The clusters should be chained in a sequential manner, determined by the Natural Method used in the workplace.

**Chaining** - linking the clusters of a large method back into a total task format.

**Mixed Formats** - In this approach, training begins with Total Task or Cluster Formats. When a particular step(s) causes a problem, provide more opportunity for practice by pulling that step(s) out of the natural cycle and teach separately. When successful performance occurs, plug step(s) back into natural cycle.

### **Seven Phase Sequence**

**Seven Phase Sequence** - is a guide to gathering information about what is natural in a work environment (Natural Ways, Means and People) and to the trainer's subsequent decisions about individualizing the work place to the needs of the Learning Partner.

**Natural Ways** - Natural ways are the natural features and unique characteristics of performance and behavior desired by the employer. Natural ways include **methods** of performance for targeted job tasks, step-by-step procedures, the culture of workplace, the manner in which workers interact, the managerial style of the setting. (Business Culture, Methods, Procedures, Interaction and Supervision Styles)

**Natural Means** - the teaching strategies, if any, used by employers to introduce new employees to their jobs and to support them when they need assistance and upgrading. (Training Approaches, Content Steps, Motivating Strategies, Rules)

**Natural People** - the people who typically support new employees to perform their jobs such as the owner/Boss, Supervisors, Co-Workers, Regular Customers.

**Back up Phases (phases 5, 6,7)** - **IF** after beginning with the natural ways, means and people of the work place the employee is not learning the task, the back-up phases guide the decisions of the trainer to deviate from what is natural but do so by engaging the company and building their capacity to support their new employee rather than the trainer making changes on their own.

**Modification** - A change in the **method** of a task without adding anything to the task. Hint: the content Task Analysis must be changed to reflect the new method.

**Adaptations** - may change the method of the task, and if so, their use must be taught as a part of a new method.

# MG&A

## **Additional Tools**

Listed below are tools and information that your Mentor may ask you to review and use depending on your individual situation. These tools are available from your Mentor only and are not on the MG&A website.

- 1) Learning Partner and Task Selection Considerations
- 2) Career Clusters
- 3) Examples of Job Type Tasks
- 4) Discrepancy Analysis Form and Data