

Successful Training and Its Essential Elements via Case Stories!

**Jonathan Klane, M.S.Ed., CIH, CHMM, CET
Klane's Education Information Training Hub, LLC SM
Fairfield, Maine**

There are certain “essential elements” required for successful training based on adult learning. These essential elements can be illustrated in detail via the use of “case stories” – examples that are entertaining “vignettes” that demonstrate the element, creating specific memories for the adult learner.

The utility of stories in safety training has been well established in the literature. In particular NIOSH/CDC has a document that explains in detail the use and benefits of stories (see Tell Me a Story: Using Narrative to Teach Safety to Skilled Blue Collar Workers by Elaine Cullen, Ph.D.)

At the conclusion of this paper, readers will be able to:

Describe and defend the need to include certain essential elements for successful training;

Explain the learning benefits of using contextual stories as part of training to create specific memories for the learners; and

Demonstrate effective story-telling as it pertains to training.

There are certain “must haves” for a story to work well in training, including:

- ✓ Relevance
- ✓ Context
- ✓ Effective
- ✓ Entertaining
- ✓ Memorable
- ✓ Makes your point
- ✓ Plot (story “arc”)
- ✓ Characters

Also, useful stories should not be what many refer to as “war stories.” To differentiate useful stories from war stories; useful stories employ many, if not all, of the above must have listed above, war stories are often rambling, irrelevant, and/or self-serving and do not make the point.

Here are training’s seven essential elements for our case stories:

1. Training (or learning) needs assessment
2. Learning objectives (LOs or outcomes)
3. Training design (lesson plans, curriculum)
4. Delivery
5. Validation, achievement of LOs, testing
6. Evaluation (of training/trainer)
7. Continuous improvement

Each essential element is presented below, followed by the story title and the story itself.

Essential Element 1: Training (or learning) needs assessment

Story: “You want me to teach BBPs to doctors?!”

A colleague, who is the EHS Manager for Colby College, asked if I did bloodborne pathogen (BBP) refresher training. I told him I did but but asked why he didn’t just do it himself; he replied that he need someone new to “change it up” for them. I was still skeptical and asked him what was the real reason; it turns out I would be teaching healthcare professionals, who probably knew more about BBPs than I did! I agreed and asked how much time I would have for the training and was told all he could get me was 30 minutes! I replied I couldn’t possibly cover everything in the OSHA standard in that time frame; he told me all I needed was to reinforce initial training, particularly regarding wearing gloves when examining students because they couldn’t imagine them having unprotected sex. In the end I agreed to do the training within the require 30-minute limit.

Then I called a doctor friend of mine to ask her about the latest developments in BBP training, explaining the reason for my request. She told me that the latest in the medical literature was about the post-exposure prophylaxis, the triple antibiotic ‘cocktail’ to treat and curtail sero-conversion to HIV positive status.

So I did my research, mostly at CDC’s website and discovered that the quicker, the better for a good outcome was needed. I also looked for statistics applicable to healthcare workers. I compiled a 1-page info sheet specifically for the college’s Health Center staff.

Now all I needed something to convince them that college students were both promiscuous and engaged in unprotected sex. I typed in my search terms “promiscuous, unprotected, sex, college, students”. While I got some really interesting sites, they were not quite what I was looking for. So I refined my search terms and found a letter to the editor of a college paper by a

female student who was bemoaning the fact that her friends were having both promiscuous and had unprotected sex.

That morning of the presentation I arrived early at the Health Center. Once the participants arrived and I was introduced, I asked the participants to tell me their name and job, and if they had anything that they wanted to learn about. Most were doctors, nurses, and therapists, plus a few EMTs and coaches. Some asked about healthcare worker statistics and a couple asked about the treatment.

I passed out and reviewed my handout on the statistics and the source I used. We were almost done and I took out a printout I had saved and read the article to them. They all were astounded by the revelation about the prevalence of college-age sex. One commented that if that were happening there, they'd have to be more careful treating their student patients.

I asked if anyone recognized the article; they all looked at me somewhat quizzically. I then turned it around so they could see it; it was from Colby College's own newspaper, *The Colby Echo*. They were astounded. "Well," one doctor said, "That clinches it for me." I looked at the class, knowing I had made my point.

Essential Element 2: Learning objectives or outcomes

Story: "They need to be able to do what?!"

While teaching my one-day train-the-trainer class, "If I'm Teaching, Why Aren't They Learning?!", one student had asked me to discuss the difference between training and education, stating that he heard them used interchangeably. "Training," I told them, "is the transfer of skills in a learning setting. Whereas education is the process of delivering information in an organized fashion." There were lots of blank stares from the students. "Not exactly a 'useful' or working definition is it?" There was a chorus of "No's." "Ok," I said. "Let me give you an example. How many of you either had, have, or will have a teenager one day?" I asked the class. Almost every hand went up. "I bet that you all want your teenager to get sex education. But," I continued, "by the same token, I bet you don't want him or her to get sex training! That's the difference between training and education." I finished as they all laughed so hard they couldn't hear me!

Essential Element 3: Training Design (Lesson Plans/Curriculum)

Story: "So, 'Ellie Bear' climbs the ladder and just then..."

I was asked if I would work with L.L.Bean on a couple of training videos that they were making. One video was for new associates in the small outlets on how to fit customers in their footwear. The second video a health and safety awareness video with a working title of "Things that can kill you here!"

When I asked what the work was, I was told they wanted me to help them script the videos because of my fun style would work well, so I agreed.

We had finished the shoe fitting video and were deep into the "Kill me" video, as we referred to it. We were trying to decide what to have "Ellie Bear" (the L. L. Bean mascot) do next. Our group included Ruth, me, and Mary, who was Ellie Bear. The question was what would we have Ellie Bear do, and I came up with the idea that she climbs a step ladder, stands on the top step,

falls, and dies. Mary (Ellie Bear) questioned my intentions but knew it'd be staged and intercut so that it only looked like she fell.

We discussed the best way to make it look like she was falling. We would show her climbing the ladder, cut to a close up of her paw coming down on the top step covering the OSHA 'Don't step here' warning sticker but it would actually be a step stool and so she would actually be only a couple of feet off the floor. She would be shown losing her balance and falling, but she would only be falling on a mat on the floor. We had to repeat this process for each of the 15 hazards identified for the video. At the end, Ruth chimed in smiling, "Poor Ellie Bear. The sacrifices she has to make for the good of the company!"

Essential Element 4: Training Delivery

Story: "You're gonna wear what under your clothes?!"

When the Maine Safety Council (MSC) asked me to present again at their annual Maine Safety & Health Conference (MS&HC); I readily agreed. The MSC would pick the topic and often to come up with a working title for the presentation, too. Since I had presented for them for several years already, they were comfortable working with me on the exact final session content.

When Laurie from the conference committee called me to feel me out on what aspect of training and adult learning I might be interested in presenting, we discussed the training topics I had previously presented, such as 'Training Tips and Tricks', both parts 1 and 2, 'Training from Hell!' and training methods shown in movies, they wanted a more in-depth subtopic and thought that something like 'Diving Deeper into Training' would be an appropriate title. We agreed and she asked me to submit the usual description. Now I just had to decide on content and learning approach or method, as well as the kind of 'wow factor' I wanted to use.

When the morning of my conference session came, I dressed and prepared for my presentation and gathered my 'props' and supplies. Laurie introduced me, and I began to discuss the session topic, talking about the background and meaning of the title of the session, "diving deeper."

Based on some rather quizzical looks I wondered if anyone was picking up on my hints of what was to come. I continued, "Let me use a visual metaphor to explain this better. When you look at me now, you see me as a professionally dressed trainer. I'm in a coat and tie. But if I take off my coat, you see me perhaps slightly more relaxed. And if I also remove my tie, I might appear even more relaxed." I continued to remove articles of clothing until I was down to the wetsuit I was wearing beneath my clothes! I even removed my shoes and put on flippers, as well as a diving mask, which I put on my forehead so I could still speak.

We then spent the rest of the time problem-solving from a long list of typical training 'challenges' I'd prepared and distributed. We used several training methods to do the problem solving such as brainstorming, open group discussions, Q&A, dyads, triads, small group work, and team approaches.

I wrapped up the session and thanked them when they applauded my efforts and going above and beyond. Afterwards as I was packing up my stuff, including retrieving my clothes, several came up to offer congratulations and their own comments on the session.

Essential Element 5: Validate Achieving Objectives and Testing

Story: “I can show you how to do it right – I just can’t ...”

I’m really not a big fan of giving tests in training – especially if it’s just giving a test for the sake of the test. But there are times when I have to give one. Some clients require it as part of their policy, and the EPA and state regulations for asbestos and lead both require it. So I do it – but I do try my best to make it as learner-friendly as I can. I use a pre-test at the start of the training. The post-test is multiple-choice and is an extension of the training reinforcing the key points. But even with all that, it’s often not enough for a student with a learning disability.

I was asked to do an asbestos worker course for some pipeline works at a facility in Connecticut. The workers were a mixed group, a few from the local facility but mostly those who had come up from a sister facility in Mississippi. They all seemed to get along quite well based on the gentle ribbing they gave each other at every opportunity. .

As is my practice to do so, I asked my project manager and then my client contact if there were any learning ‘issues,’ such as problems reading or functional illiteracy and was told to ask the facility contact.

During the training I kept prompting the guys to with questions on key points or by having them finish my sentences with the right term or fact. By the end of the course I was pretty comfortable that all of the guys were ‘getting it,’ meaning they stood a good chance of passing the mandated test with a minimum score of at least 70 percent.

I had noticed that most of the guys were able to read just fine but there were a few who read with some difficulty, but Billy was the one who obviously struggled to read. He understood the material just fine, but he just couldn’t read it real well. He did very well at the Jeopardy game, which I use as a review; in fact, he better than some of his comrades who were better readers.

Before passing out the test, I once more reminded them that if any of them wanted me take the test verbally with me reading them the questions and answers that it was absolutely their right, but after looking around the room and getting no response, I passed out the test papers.

After a while they started to finish and turn in their tests.. I graded each one and congratulated them on their passing scores. Eventually there were only two of the guys still remaining working on their tests: Jeff and Billy.

Jeff was outgoing and friendly and the type who tried to make things good for all of the guys, especially if one was getting picked on, struggling with a task, or just having a bad day. He was one of the guys who could read with some amount of difficulty.

Jeff cleared his throat to get my attention and spoke up, “Jonathan, can you please help me with a word here – I can’t understand it.” He said it clearly and just a bit louder than was necessary for me to hear him as if he wanted someone else to hear him, too. ““It’s this one here.” he said pointing to a word in a question. “That’s ‘mesothelioma’ I said. Do you remember what that is?” I asked. “Oh yeah, sure do – thanks, I’m all set!” he said rather cheerily. I went back to my spot and Jeff continued working on his test paper. Billy had looked up when Jeff first spoke up, but now he had his head down and continued to look intently at the test paper I front of him.

A little while later Jeff got up and brought his test over to me. “Here you go Jonathan – let me know how bad I did.” I graded his paper and tallied his score. “Congratulations Jeff! You

passed, no problem.” I said putting my hand out to congratulate him as I had with each of the others.

He looked it over and once he was done he said with one of those half embarrassed smiles, “I made a few dumb mistakes.” Then he added even more quietly, “Thanks again for the help with the word ‘mesothelioma’ before. That’s a tough word and it helped.” Jeff bent over closer as if sharing a secret, “You know, I asked you for the help on purpose – I thought it was ‘mesothelioma’ but wanted to be sure.” “Was that the only reason you asked me Jeff?” I inquired, while smiling and turned my head just a bit to the side to look him in the eyes. He smiled, “No, it wasn’t the only reason. I said it a bit loud so that Billy would hear and hopefully after seeing that it’s ok to ask for help. We both glanced over at Billy for a second – he was still looking intently at his test paper. “I guess we’ll see soon enough if it worked.” I said quietly.

I checked my watch; it had been close to two hours since we started on the test. The test was 50 questions, so it was getting to be a bit long for most people. I looked over at Billy and this and asked him how it was going, but he still would not ask for help, so I offered to look at his test to see how he was doing. He showed me his test, and I scanned it mentally, counting how many he’d gotten wrong so far. He had only finished to question number 35, and he already had had 10 wrong; only 5 more wrong out of 15 and he wouldn’t pass. His job likely hung in the balance or at the very least, he thought it might.

I looked up and tried to give him an encouraging smile, though he looked really worried. Unless I did something, his worrying was likely to make things worse, not better. I reminded him how well he had done orally on Jeopardy, and suggested that I read the test from the beginning so that he could change any answers if he wanted to. He enthusiastically agreed.

So, I proceeded to read him the test. First I’d read the question, then I’d read him all four possible answers. Sometimes he’d ask me to re-read the question or one or more of the answers. We finished the test in about 30 minutes total.

Now it was time to total the answers to see if he had passed. I had tried to keep a mental tally in my head and thought he had passed but couldn’t be 100% sure; I didn’t want to give him false hope if he had too many wrong. I went back and marked those that were wrong. I totaled up the scores from each page and wrote his score on the front page of his test. When he asked how he had done, I turned the test page toward him, pointed to his score-- an 86!

I packed up my gear and started to load my car. A few of the guys came over and thanked me. Bob, the crew leader, came over to me, and shook my hand, thanking me for what I had done for Billy. I replied that it was within his rights under the Americans with Disabilities Act. Billy came over and stuck his hand out to shake mine and pumped my hand vigorously as he thanked me, teasing the crew leader that he had even received a higher score than Bob!

Essential Element 6: Evaluation (of Training/trainer)

Story: “Oh my G*d, I didn’t know it looked so...?!”

There are many ways to evaluate trainers and those ubiquitous evaluation forms aren’t necessarily the best way. They can be very helpful when you need to evaluate many trainers and trainings like at conferences. Other ways include formative and summative ones, verbal feedback, non-

form written feedback, peer review, audits, and video recording to name several. The most useful one – meaning the one that provides the trainer with the best feedback and ways to improve – is arguably video recording. There is nothing like watching yourself on video to show you how you are in the training. Video can be very ‘unforgiving’.

Many years ago I did some interactive television (ITV) training for the Maine School Management Association (MSMA). Basically, I would be in a studio at one location (often a college), and others could go to other similar locations and watch and , listen, and call in with questions.

So, my friend and colleague Phil and I wrote a grant proposal to develop and deliver several refresher training topics for K-12 school personnel all over the state. Instead of using funds for travel (by either the trainer or the trainees), the money could be spent on the training itself. The grant proposal was accepted and funded, and we developed training in asbestos, bloodborne pathogens, chemical safety, displays (as in video display terminals), and ergonomics. We called it “The ABCDE’s of Safety Training!”

We went to the University of Maine’s Augusta campus and set up for the first training video. I had my overhead slides and talked with the Greg, ITV technician who showed us how it worked and where the camera would be pointed, where to put my slides for the overhead camera, the microphones, etc. He asked if we’d have any ‘students’ in the studio, and we said at they would be at the other ITV network locations.

Greg asked if this was our first one in this series or if we’d done any already, and we said this was our first time. He said he’d be in the camera room controlling the cameras, sound, lighting, which worked with joy sticks, just like with an Atari video game console. Since it was not easy to do quick movements, he asked me not to move around because he would have to chase me with the camera and it would look unprofessional. I agreed, to stay put.

I took my place in the speaker’s area, got everything all set, and told Greg I was ready. At the scheduled time we started, and I spoke and for the next 60 minutes, making sure I didn’t move out of my area. I felt myself start to a couple of times and had to ‘anchor’ myself by casually holding onto the speaker’s desk.

I asked if people had any questions to please feel free to call in at any time. I reminded them several times in the ‘broadcast’. I asked if we had any callers but each time Greg said, “No.” It became a running gag. I tried to do what I could to change things up, tone of voice, pace, and topic, joked with my partner. We received one lone phone call.

When I asked my partner how he thought it went, he said “It went great!” Greg came in with our videotape, and assured me that I spoke well, smiling as he handed me the tape. But as we were leaving, he said, “You’ll want to put on your hat!” “It’s pretty sunny outside.” I didn’t think anything about his suggestion until much later.

So I went back to the office and turned on the VCR and TV in the conference room. I hit play and the video started. The conference room phone rang—and I didn’t return until the tape was over. I decided to watch it that evening instead with my wife ,Deb. As I was leaving the conference room, one of my coworkers complimented me on the video, then made a strange comment about wearing sunglasses outside because it was so bright. Again, I thought and odd comment but went home to watch the video.

Once I was home, I went over to the VCR, popped in the tape, and hit ‘play’. It started and my wife and I sat down to watch. After a while, I started to notice that my head was sweating.

Not a lot – at first . As the tape played, my head kept getting more and more sweaty and shiny; too! The lights in the studio that were making me hot and sweaty were also reflecting off of my head like the beacon of a lighthouse! Eventually, it got so bright that it was hard to watch. Now all those earlier comments made sense to me!

I turned to Deb to ask if she'd noticed it; of course she had! We had a good laugh about it but then I asked her what to do about it. According to my wife, there was not enough powder in the world to cover my bald pate! As I stated before, video can be very unforgiving—lesson learned.

Essential Element 7: Continuous Improvement

Story: “My policy is to never attend courses taught for the first time by a trainer!”

At a week-long “Train-the-Trainer” we were talking about the 7 essential elements of training, especially the last one: course improvement for the next time; and there's *always* a next time. When I asked the students for comments, one of my more vocal students raised his hand and stated that he never attended courses taught for first time. When I asked why, he stated that it was because the class was “rough around the edges.” A considerable discussion amongst the other students followed in which most were in agreement with his sentiments.

He compared it to our class, stating it was obvious that I had taught it many times before. Then I asked the class if classes go through a series of improvements each subsequent time they are taught, what do we do about the first time one is taught and which version is the best—the second, third, 25th?? Thus began a lively discussion regarding the merits of first-time classes and way of improving classes each time they are taught. One student thought that first-time classes meant that trainers were more open to experimentation, Another added that trainers needed to review a course to see how it went and decide what needed to be changed. When I asked how a trainer should decide, there were several suggestions, such as reading student evaluations and asking other trainers for input. One student suggested that the trainer “play it back in their head,” also called reflection on practice. I countered with that was one of the ways I decided what worked and what didn't. I gave examples of the results of the process: new handouts, examples, exercises, or ways of crafting my training. Sometimes it makes it novel and fresh; sometimes it flops as dead as a mackerel on the deck of a fishing boat! And then we moved on to other adult training methods.

Adult Learning Principles (ALPs)

Here are a “top 10” adult learning principles (ALPs) for our next set of case stories:

1. Applicable (immediate need)
2. Learning styles
3. Learning domains
4. Learner participation/engagement
5. Self-directed learners = flexible on topics
6. What you say matters – *a lot!*
7. Active learning (*anything but lecture!*)
8. Trainer self-deprecation

9. Learn best by...*teaching!*

10. Fun = Learning!

ALP 1: Applicable (Immediate Need)

Story: “We don’t use one of those here.”

A client of mine, Bruce, from Hammond Lumber asked me to do their annual safety training day several years ago. We did hazard communication, bloodborne pathogens, ergonomics, and personal protective equipment (PPE). When I asked to emphasize for PPE, I was told that it would be excellent if I could convince the employees to wear their safety glasses while working with power tools.

I knew I needed a good case story about the importance of wearing one’s safety glasses. I went to NIOSH’s website and set about finding a good convincing case. After looking for quite awhile, I finally found one, complete with a picture !

When the training day arrived and I was getting all my props all set up, and Bruce asked whether I was able to come up with a solution to the safety glasses problem. I assured him I had found a great case study with picture, assuring him it was “not gross.”

We got to the PPE refresher training and I began my NIOSH story about a young man who worked in construction and came home with aluminum dist in his eye. When his father asked if he was wearing safety glasses, he said no, but he would in future because his eye still hurt from the dust.

The next day on the job site the young construction worker was using a power stapler to put up some vinyl siding, going along, one staple after another, until the staple hit a metal joiner plate and ricocheted back, hitting him square in the glasses. His head recoiled from the force of it. And when he stopped and took off the safety glasses, the metal staple was embedded partially in the lens of the safety glasses. If he hadn’t chosen to wear the glasses today, that staple would be embedded in his eye! I showed around the picture of the safety glasses with the staple through it. They all looked at it intently. Some groaned, some whistled quietly, there were quiet comments exchanged. When I asked what the class thought, one guy replied that they didn’t use power staplers or put of vinyl siding here!

It was quiet; you could have cut the air with a knife. I wanted to say but didn’t– it’s the same sort of thing. The lesson is wear your safety glasses or you might just lose your eye with a staple stuck in it! But then I realized that it wasn’t the same thing. They didn’t use power staplers and they didn’t install vinyl siding there. He was right and I should have known it and realized it. After all, I studied Malcolm Knowles seminal work on adult learning. Rule number one was that the learning had to be directly applicable to the learners. Also, it had to represent an immediate need, not something that they didn’t do there.

So I put a contrite smile on my face and admitted that they were right but that there weren’t any good case studies about undoing the metal bands from stacks of lumber. Bur although the situations were not identical. We could still agree that it was vitally important to wear safety glasses when working with tools. Several of the trainees spoke up in agreement or nodded their heads. I looked over and got the a-ok look from management. Phew, I thought to myself, I dodged that bullet – or should I say, that staple!

ALP 2: Learning styles

Story: “It’s like there’s a tape recorder in my head.”

When my good friend, and fellow CIH, Ron, signed up for my Asbestos Inspector Initial course, I was surprised, since he had as much experience as I and more expertise in many areas. I asked him why he was taking it. Ron admitted he had never taken the course and needed the points!

The first morning of the asbestos class came and Ron sat down at the table closest to me on my left. I started the course and after brief introductions started the technical presentation. Ron was sitting quite comfortably, with one leg over the other, his hands clasped lightly on the knee of his upper leg. Although he looked my way, he didn’t move at all, and stayed this way for two hours until our mid-morning break. Even though he politely chimed in with a couple of good points regarding IH, otherwise he didn’t do anything. Most of all, he didn’t take a single note, and he didn’t look through his handouts.

So, by the break I was more than a bit concerned that he was way above what I was covering. When I asked him how it was going, he replied that it was great. I asked him why he wasn’t taking notes or reading the handouts, he replied that he was an auditory learner—he learned best by listening. He said, “It’s like there’s a tape recorder in my head. You’ve heard of a ‘photographic memory’?” he asked me. I nodded yes. “Well, I have a *phonographic* memory!” he finished.

Since that time, I’ve had students complete a self-assessment on their preferred learning style in my train-the-trainer classes. Usually in an average class of between 15 to 25 students, there are usually only 1 or 2 auditory learners. I’ve told this story about Ron repeating his words about a phonographic memory (but not my suggestive pun). Often the auditory learner will comment on this affirming Ron’s analogy, even thanking me for understanding about their learning style. What I thought would be a class for Ron became a teaching moment for me.

ALP 3: Learning domains

Story: “Let me tell you about my in-laws...”

Let me tell you about my in-laws. My wife Deb’s Mom Lorraine was a homemaker who did some part-time and occasional temporary work to help make ends meet. Her dad, Charlie, worked all of his adult life (and much of his youth) in textile mills throughout New England, working in the ‘carding room’ on a carding machine, which takes the raw material and ‘cards’ it into a weavable strand of fibers. It’s extremely dusty.

One day Charlie offered to take me down to the mill where he worked to show me around. As I was a new IH, I was eager to see the inside of a textile mill in operation.

When we got there he took me to the carding room where he worked. It was noisy and very dusty from the wool that they were carding. I asked if they always carded wool, and he answered that the sometimes carded cotton and even, for awhile, carded asbestos for fore-proof blankets for the military. I stood there watching all the running machines; it was so dusty you could not see from one machine operator to the next. It was just like I’d learned in IH, only this wasn’t some textbook case – this was Deb’s Dad.

In 2004 Charlie was diagnosed with lung cancer. The doctors told him that his only chance

was to remove 75% of his diseased lungs. Although the operation was a technical success, Charlie had a massive stroke in his sleep and never regained consciousness.

Eighteen months later, my mother-in-law Lorraine had developed lung cancer from secondary sources; namely, washing Charlie's clothes every day when he brought them home from work when they carded asbestos from the mill. She lasted 3 more years, and gave me permission to use their story in my classes, hoping it would help someone else.

So I tell a shortened version of this story in many of my IH courses. Sometimes Deb helps me with the Lead Renovator Courses and she tells the story to the class. It's more powerful with her telling it. In training and adult learning here are three 'learning domains:' cognitive, tactile, and affective. It's the affective domain that deals with our emotions and values and it's the only one of the three that stands a chance at *affecting* a behavior change. Use the affective domain in your training next time you want to change someone's life – before it's too late.

ALP 4: Learner Participation/Engagement

Story: “THB (trainer hold back) is from my Dad's...”

I have a policy I call “trainer hold back” or THB for short. It basically means that the trainees or students always get to speaking first in class. I, as the trainer, speak only after they get their chance to participate. Its purposes are pretty obvious. By going first, they are more likely to speak up, offer a new suggestion, participate, get engaged in the learning, share their expertise, etc. If I were to chime in first, it would likely cut off student discussions – something we definitely don't want to do.

I got THB from my Dad. He had a dinner policy called FHB or “family hold back” for whenever we had guests over. He could just say softly to us “FHB” when the guest was out of earshot and we all knew what he meant.

One time my Dad had a colleague in the shoe business, Art, over for dinner. After taling for while, Art had gone to wash his hands and my Dad said to all of us, “Now remember everyone, FHB, right?” “Right,” we all replied in unison.

My Mom had made ribs, mashed potatoes and salad for dinner. Ribs, like steak, were a special treat. My Mom served our guest Art first, of course. “Art, would you like some ribs?” she asked him and he replied that he did.

When she asked me, I also answered yes. She served us all the mashed potatoes and salad, and we all began to eat. Art was the first to finish his first half rack of ribs and Mom asked if he wanted more ribs, and he replied with gusto. When I looked at my Dad, he mouthed FHB. I knew right then not to ask for any more ribs until Art was done eating his and had declined any more. So, I ate my ribs slowly, savoring every bite. When Mom asked if I wanted more, I asked for mashed potatoes and salad instead of the ribs. By the time he was done, Art had eaten all the ribs, telling Mom they were the best he'd ever had.

After Art left, Dad smiled suggested that in a few months, we could have ribs again, without any dinner guests. There would be no FHM that night for sure!

ALP 5: Self-directed Learners + Flexible on Topics

Story: “I got an email that said they used to put...”

Many years ago I was doing some asbestos awareness refresher training at the University of Maine for their facilities people. We were in a big auditorium that held over 100 students. So, I did my usual introduction, offering to answer any questions that they might have on asbestos, as well as related topics.

I had done most of the 2-hour awareness training. I had told them all about asbestos – its uses, health effects, and where they'd find it at the University. I showed them the scene in the movie "The Wizard of Oz" where they were in the field of poppies and Glinda, the Good Witch, makes it snow to wake them all up. I told them that all of that snow was chrysotile asbestos, which provoked shocked reactions.

When we were in the final Q&A, questions a woman in the back of the auditorium raised her hand very hesitantly said she received an email from a friend that there was asbestos in a popular "feminine hygiene" product. I thought I had heard them all, but I hadn't heard this one. There was a gale of laughter but I knew I had to take it seriously. I asked her why this was supposedly done and she told me (I won't go into details here for the more squeamish among you). I told her I had not heard that but would look into it and get back to Roger, the representative for the company, when I had an answer.

I did my research and, as I suspected, it was an "urban legend"—it has even been investigated by the FDA, and there was no truth to it. I sent Roger an email to that effect and he thanked me on behalf of the woman, whose mind was set at ease. I think the moral of this story is—don't believe everything you read on the internet and don't be afraid to ask questions, even embarrassing ones. And trainers should never dismiss such questions, because they come from real concerns and you may be able to stop an outrageous story from spreading—or at least slow it down a bit!

ALP 6: What you say matters – a lot!

Story: "What the #@%&! is a 'TLA' anyway?!"

About 16 years ago I was taking my quadrennially required refresher courses for the OSHA 10- and 30-hour OSHA-Authorized Trainer in Construction and General Industry at Keene State College's Education Outreach facility in Manchester, NH. I was in the construction refresher sitting, in front of a couple of loss control guys from an insurance company and an OSHA Compliance Officer; the rest were from construction companies.

At one point one of the construction guys mentioned something about a 'JLG'. I thought, what does JLG stand for? I didn't recognize that three-letter acronym (TLA) but let it go. After a little while, one of the other guys mentioned 'JLG', then another, and another, until pretty soon it was 'JLG this' and 'JLG that'. The loss control guys behind me whispering back and forth rapidly, "JLG? What a JLG?" "D****d if I know!" said the other one. "Well," replied the first, "I'm gonna find out d****t." He spoke up so that he'd be heard by the instructor and the class, "Alright, I'll show my ignorance, but what the hell is 'JLG'?" The guy who had mentioned it the most answered, "It's a major brand of lift truck. You see them all the time on construction sites."

The rest of the week proceeded well. There were good discussions about all sorts of construction hazards, OSHA rules, and what to do about them. No one mentioned JLG again – I wasn't sure if it was on purpose or not. No matter. No other TLAs came up in our discussions either that I didn't know or recognize.

On my drive home, I went passed a construction site, looked over and there they were – 2 JLG man lifts! Over the next few weeks I saw them everywhere! Every construction site had one or more and some maintenance jobs had them. I couldn't believe I had never noticed them before. It just goes to show you that even a seemingly common acronym that one might expect everyone to know isn't always known by everyone even in that industry. So, go ahead and use acronyms, either spell them out first or be prepared to say what they are. Don't use them like a cudgel or bat to show off to others, but don't laugh when someone asks about one. It might be you next time.

ALP 7: Active Learning (Anything but Lecture!)

Story: “What the heck was that we just attended?!”

One year I attended a session on active learning at a conference. The description indicated that the speaker would be covering non-lecture training methods. Fantastic! I thought – sounds like its right up my alley. I wonder what the speaker will do to emphasize that lecturing is an ineffective way to learn.

I sat down next to my colleague Don and asked if there was a handout. There wasn't but maybe the speaker or the moderator will have one Handouts weren't required but many speakers would bring one anyway. The moderator then introduced the speaker who sounded like he knew his stuff and was well credentialed.

The speaker began to talk...and talk...and talk. He never stopped once to do anything else. In a session on other, non-lecture training methods, the speaker had just done the one thing you'd never expect him to do – he lectured the whole time!

When the session ended and we left the room, we both looked at each other, and shook our heads and Don asked, “Just what the heck was that?!” he asked. I laughed, “D****d if I know.” I said, “But I think it was a lecture actually!” Don just smiled and laughed. We learn best from our mistakes – and sometimes we learn better from others' mistakes, too.

ALP 8: Any Question Is a Good Question

Story: “I've got a question – how do you get your...”

One way I strive for more engagement and student participation is to encourage any and all questions. I emphasize it in my classes and then reinforce it by answering *every* question posed to me as best as I can.

I was doing a lead paint renovator class at the University of Maine and I had a full classroom of facilities guys. They did work in steam tunnels, HVAC rooms, chemistry labs, and the university daycare, U Park apartments, and in the Resident Director's apartment in the dorms where there might be little kids. The guys had all introduced themselves and many expressed concerns about not poisoning a little kid with lead dust from their work.

I had just finished extolling the virtues of asking me any question and one guy in the back of the room raised his hand. Great! I thought. Here's a guy who wants to know about lead toxicity, safe work practices, health effects, or maybe what to do with the lead waste. I called on him.

Instead of the questions I expected, he asked me how I got my head so shiny!! There was a burst of laughter in the room. I first answered that I buffed it with Butcher;s Wax but since it is a skin irritant, I took that back and replied that my wife thought it was from the fish oil from all the

salmon I ate! Again there was laughter, and it served as an ice-breaker for the session. The moral is to answer every question – even the funny ones.

ALP 9: Learn best by...teaching!

Story: “Excuse me Mrs. G, actually it wasn’t like that...”

If you’re a trainer, then you’ve probably seen the table of percent retention versus training approaches. At the lowest “return on training” (or ROT as I like to call it) is we retain only 10% of what we hear, which is why lectures mostly don’t work well. At the highest ROT is we retain 95% of what we teach. So, if you want to increase student retention, then have them teach each other. I try to incorporate this in my training whenever I can.

When I was a senior in high school, I was taking an English course that you usually took in your junior year, so I was the upper classman in a room full of underclassmen and admittedly enjoyed showing off a bit.

Our teacher was Mrs. Ghiardelli but everyone called her Mrs. G for short. I actually knew her a bit because her husband had been the head guard at the neighborhood pool that my family belonged to. Because of this, I could talk to her more with a bit more familiarity than the other junior students.

We were studying the book, *The Iliad*, by Homer. Now, I’d always had a love of Greek mythology and it just so happened that I was also taking a course in Mythology that same semester, so I knew the background and story of the Trojan War. Mrs. G started to discuss the story of the Trojan War’s beginning. So when Mrs. G made her first mistake, that the war started over the wedding party for Perseus and Andromeda, my hand shot up to tell her it was Peleus and Thetis. She thanked me for correcting her and moved on. Then she made a few more mistakes that I was more than happy to correct, unaware that I was beginning to try her patience.

Finally, she turned to me, sighed and said, “Jonathan, would you like to teach this class?” I knew she didn’t really mean it, or at least I didn’t think she did, but I didn’t care and called her bluff. So I grabbed my mythology notes, jumped up, and went to the front of the class.

I started over at the beginning, using my own words. I was doing fine until I got to the part where Eris throws the apple onto the banquet table for the fairest female guest to pick up. When I described Eris as p---d off, Mrs. G. glared and told me to start over. It took awhile to come up with the right word, *miffed*, “I looked at Mrs. G. hopefully. She smiled, nodded and said, “Much better Jonathan.” I breathed a big sigh of relief and continued.

I think that was when I knew I wanted to be a teacher. Little did I realize at the time that I’d become a college professor and not a high school teacher. I learned a lot that day about teaching, preparing, knowing the material, watching your words, and especially letting others help you teach. It’s fun for everyone and it really helps them to learn a lot. That’s the ultimate goal – to help others to learn – a lot!

ALP 10: Fun = Learning!

Story: “Try smiling! ☺”

Smiling has multiple benefits. It makes you feel good. It makes you look better. It brightens your mood. And it is contagious. I find that if I smile, others will smile back. They’ll know my mood and that I’m giving them my ‘permission’ to smile and often to laugh – usually at me or my

expense (another good thing in training and trainers).

This past year my wife Deb and I taught about 20-25 Lead Renovator classes. Some went well, others not as much. As I thought the ones that didn't go as well, I realized that the ones that didn't go as well were those I taught by myself without Deb, and that as I wasn't in as good a mood so I didn't smile as much. Could that be the difference? I'd have to find out.

So, in subsequent classes, I made it a point to smile and to laugh even more than usual. In one class we had a few guys who were really negative about the course, the rule, the EPA, the costs, me, everything. There was one particular guy, Joe, who was especially negative. So, I just kept smiling and kidding around with him, but in a very nice, gentle way; I didn't give him a hard time. By the end of the day, Joe had come around and thanked me for a great course. "A couple of the guys who had noticed it all came up and said they couldn't believe I'd managed to turn Joe around. What's the saying? Kill them with kindness.

So, when you don't know what else to do, try smiling – at the very least it's disarming! Smile!

Well, that's it for the stories. I hope you enjoyed reading them as much as I enjoyed writing them. Here are my key points regarding the use of "case stories" in training:

- ✓ Stories work in training!
- ✓ Make it pertinent and powerful, memorable and meaningful, effective and entertaining!
- ✓ No rambling, irrelevant "war stories" please!
- ✓ Tell a story in your next training!
- ✓ "Got questions?" SM

Thanks and good training! Oh, and "the end"!

Bibliography

Cullen. Elaine. 2005. NIOSH 20050152, "Tell Me a Story: Using Narrative to Teach Safety to Skilled Blue Collar Workers." (www.cdc.gov/niosh/mining/pubs/pdfs/tmasu.pdf)

Snopes.com at www.snopes.com/medical/toxins/tampon.asp, retrieved on March 4, 2011.