Description

Counseling clients in a PTAC environment involves a variety of instructional methods but the common denominator is to explain complex issues so the client can understand and perform the necessary tasks successfully.

The purpose of this document is to provide a guide of the salient points of which Procurement Technical Assistance Center (PTAC) Advisor/Counselor should have knowledge as they assist clients in this realm of government contracting.

Identify and define the appropriate method of instruction

- One-on-one counseling, including coaching, consultation, professional advice, etc.
- Small group workshop, including group counseling, informal instruction
- Workshop, formal instruction with exercises
- Seminar, with both plenary presentation and breakout discussions
- Conference presentation or lecture, with little or no Q&A
- Educational class for credit
- Other approaches or variations

Skills and techniques that PTAC members should know how to use

- Learning styles: The instructor must understand that adult learners have different needs than typical students, process new information more slowly, need more light and amplification and comfortable seating than young people, are goal-oriented in terms of learning how to accomplish something they want to do, and may be embarrassed to ask a question they think their peers would view as a stupid question.
- Understandable terminology: The instructor must be able to speak in terms the audience can understand, such as translating all acronyms, defining terms without being asked to, and avoiding specialized lingo; this is not an opportunity for the instructor to show off or claim proprietary knowledge; it is an opportunity to bring other people into the instructor's world as equals.
- Learning environment: The instructor must control the learning environment and rearrange the room if necessary or direct how the presentation equipment should be arranged, for example.
- Instructional materials: The instructor must prepare the instructional materials (whether Powerpoint or innovative technologies or paper handouts or whatever) in such a way that they serve the intended purpose, such as slides that are readable from the back of the

room, or detailed charts that are handouts for future reference, but these are not interchangeable.

- Conducting the class: When designing exercises for small group discussion, explain clearly how the group is to be organized and how it is to function, what it is to do, how much time it has, and what is to happen next. The exercise should be simple as an example, not complex as a project.

- Grading papers: When designing a test or quiz, remember that what the students submit must be reviewed and graded, so avoid long essay questions, especially with a large group.

- Technology: The instructor must know how to operate the equipment, or have a technical aide to do it, and always have a backup plan for equipment failure. Anything that is to be loaded onto a computer should be on an external USB drive (not a flash drive which can fail, or which some agencies prohibit) or a CD or both, or should be sent in advance as an email attachment or however the organizers direct.

- Learning by osmosis: Instructors should pay attention to other presenters and make notes of techniques they observe that are effective as well as non-effective ones; even when attending an event that is not interesting, always learn presentation techniques from the presenter.

- Variable views: Present the material in multiple ways, including concept map, outline (bullet points), and text, as well as spoken explanation, to accommodate people's different learning styles.

- Creature comfort: Have a break at reasonable intervals, a 50-minute hour is typical, no more than 90 minutes apart, so people can stretch, use the restroom, or return a phone call; and make sure to adhere to the schedule for them to return when you will resume the lesson.

- Public speaking: Never turn your back on the audience to read the screen behind you; read from the computer monitor in front of you, facing the audience. Always use the microphone even if you think you have a loud voice, because older adults lose portions of their sound register and need amplification. Speak slowly and clearly; muttering an aside is not effective. Use appropriate gestures and facial expressions for animation, because a motionless "talking head" is boring.

- Individual training: Sit facing your client, with the papers turned to them, so you must be able to read upside down. Clear your desk of clutter, or meet in another room. Have the client make notes as you explain things, because they learn by doing. Have the client sit at the computer while you guide them through navigating a site. Pay close attention to when the client's eyes start to glaze over and do not overwhelm them with more information than they can absorb at one sitting.

- Timing: For formal presentation, rehearse your speech several times, watching the clock, to be sure it fills the allotted time and doesn't run over. For informal presentations, such as workshop discussions or counseling sessions, rehearse what you want to explain,

pretend they ask a question, rehearse your answer, and practice conducting the session before it occurs. You should appear comfortable with what you are saying and should not give the impression you don't know what you are talking about.

- Handling questions: People learn better in a facilitated environment, so instead of just answering the question, suggest that someone in the group might comment on it; try to draw them out to participate, help them along with questions of your own, let them come up with ideas, and eventually you can add your knowledge. Practice this technique so you become comfortable with it, because it is very tempting to just dump your knowledge into the void and look like a hero, but that is much less effective in the long run. Let people grow in your presence.

References:

Association for Talent & Development
http://www.astd.org/

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