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# Fundamentals of Instructor Training

## Self-Study Guide for Educators and Trainers

### Lesson 1

#### INTRODUCTION

1. Review the Course Purpose in Lesson 1 in the participant’s manual on page 1.
2. Review the Learning Objectives for this course in Lesson 1 in the participant’s manual on page 1.

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### Lesson 2

#### HISTORY AND MISSION OF THE AMERICAN RED CROSS

##### Lesson Objectives

After completing this lesson, instructor candidates should be able to—

- Identify the lines of service in the American Red Cross in a matching exercise.
- Describe the qualities or characteristics of Red Cross heroes and relate them to concepts of volunteerism and community involvement.

1. Become familiar with the description and mission of the American Red Cross.
  - The American Red Cross is a humanitarian organization, led by volunteers and guided by its Congressional Charter and the Fundamental Principles of the International Red Cross and Red Crescent Movement.
  - It is the mission of the American Red Cross to provide relief to victims of disaster and help people prevent, prepare for and respond to emergencies.
2. Watch the Fundamentals of Instructor Training video segment: “History and Heroes of the Red Cross” (8:57).
3. Turn to the exercise, “Lines of Service,” in Lesson 2 in the participant’s manual on page 3 and complete the matching exercise. Then check your answers—they should have been D, C, F, A, B, E, in that order.
4. Read Appendix A, American Red Cross Historical Heroes, on page 25 in the participant’s manual as a supplement to the video.
5. It is important to be aware that—
  - What the American Red Cross does cannot be accomplished without our greatest resource—the people of the American Red Cross.
  - The American Red Cross has many heroes—historical and modern day— throughout our Lines of Service.



- Our most familiar hero is Clara Barton. Because of her devotion and dedication in founding the American Red Cross and throughout its early years, the organization has served Americans since 1881 in wartime and in times of peace during natural disasters and national calamities.
  - The lines of service have heroes throughout history. Examples are the individuals highlighted in the video who identified needs in their communities and volunteered to become involved to address those needs.
  - The spirit of volunteerism and community involvement continues with the paid and volunteer staff that make up the American Red Cross today.
  - Modern-day heroes of the American Red Cross are making a difference in their communities and around the world.
6. Turn to the exercise, “Heroes of the American Red Cross,” on page 4 in the participant’s manual. Identify and list three characteristics of heroes and explain how these characteristics relate to concepts of volunteerism and community involvement.

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## Lesson 3

### CHAPTER PRIORITIES

#### Lesson Objective

After completing this lesson, instructor candidates should be able to identify key chapter priorities.

1. Read the following information to understand the structure of the Red Cross.
  - The International Red Cross and Red Crescent Movement is the largest humanitarian, volunteer organization in the world, with over 175 member countries.
  - Seven guiding principles provide direction for the movement and all Red Cross and Red Crescent Societies must adhere to them.
  - These principles include the following:
    - Humanity
    - Impartiality
    - Neutrality
    - Independence
    - Voluntary Service
    - Unity
    - Universality

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- The American Red Cross is not a governmental agency.
  - It relies on the generosity of the American people to offer its services.
  - The American Red Cross is required by Congressional Charter to provide—
    - Relief to victims of disaster.
    - Emergency communications and assistance to members of the Armed Forces and their families.
  - Consistent with the seven guiding principles of the International Red Cross and Red Crescent Movement, the American Red Cross helps people prevent, prepare for and respond to emergencies.
  - Volunteer leadership and guidance is provided to national headquarters by a Board of Governors.
  - National headquarters of the American Red Cross provides direction and materials to the local Red Cross chapters.
  - National headquarters reserves the right to control and monitor a chapter's operations, courses and use of materials to ensure quality and consistency with national goals and priorities.
  - A local chapter is chartered by the American Red Cross and is responsible for providing American Red Cross programs and services within its assigned jurisdiction.
  - Most chapters have a paid staff. However, the chapter is governed by a local volunteer board of directors, and primary service delivery is accomplished by volunteers.
2. Turn to Appendix B, The International Red Cross and Red Crescent Movement, on page 31 in the participant's manual for more information about the seven guiding principles.
  3. Turn to the exercise, "Local Chapter Priorities," on page 5 in the participant's manual. Fill in the name of your local Red Cross chapter and mark the boxes for the services and activities that you think your local Red Cross chapter may offer. Your local chapter representative will review this material with you after you have completed this self-study guide. At that time, also ask your chapter representative to let you know about its priorities, major fundraising events and/or other special events it may sponsor.
  4. Turn to Appendix C, American Red Cross Health and Safety Services Programs and Courses, on page 33 in the participant's manual. This is a listing of most Red Cross programs and courses. Contact your local chapter if you are interested in any of the programs and courses listed.



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## Lesson 4

# STYLES OF LEARNING AND INSTRUCTION

### Lesson Objectives

After completing lessons 4 and 5, instructor candidates should be able to identify appropriate teaching methods and facilitation skills used in American Red Cross courses.

1. Review these definitions of learning and the types of learning included in American Red Cross courses.
  - There are diverse definitions of “learning.”
  - Most would agree that learning—
    - Involves the process of change.
    - Requires acquisition of new knowledge, skills or attitudes.
    - Comes from study and/or life experiences.
    - Occurs over a period of time.
    - Is a lifelong process.
  - Red Cross courses include three types of learning:
    - Affective: Change in attitudes and/or behavior
    - Cognitive: Introduction of new facts, concepts and skills
    - Psychomotor: Introduction of new motor skills
2. Be aware that in most cases, American Red Cross courses have standardized instructor outlines with required and/or recommended activities and strategies allowing instructors to provide consistent, high-quality instruction that meets the learners’ need for accurate information, builds correct psychomotor skills and facilitates the learners’ ability to make decisions and solve problems. Through preplanning and ongoing evaluation during a class, instructors can address individual learning needs and characteristics through the use of specific strategies to enhance learning and overcome barriers. You need to know these strategies, remembered with the mnemonic **MARS**, that are used throughout American Red Cross courses to enhance learning.



## MARS

The mnemonic MARS (motivation, association, repetition and senses) can help you remember these four concepts of learning.

- Motivation** Participants learn more effectively when they find value in the subject and/or are goal directed.
- Association** Participants learn more readily when they can associate the information with previous experiences or learning.
- Repetition** Review, summary and practice provide repetition that helps participants learn.
- use of Senses** Learning occurs more rapidly when participants are engaged and actively involved in the learning process through the use of as many senses as possible.


3. Turn to the exercise in Lesson 4, “Motivations to Learn,” on page 7 in the participant’s manual. Fill in some motivations to learn that participants might have and give examples of American Red Cross courses a participant might choose to take given that motivation. Then read the bullets below for some suggested answers.

<b>Motivation</b>	<b>Examples of American Red Cross courses</b>
● To learn job skills	Babysitter’s Training, Lifeguarding, Personnel Practices for Supervisors
● Interested in the subject	Adult CPR/AED
● Have health concerns	HIV/AIDS Prevention Skills
● To learn “how-to” skill	Learn-to-Swim
● Required by or for job	Workplace Training: Standard First Aid, Serving the Diverse Community
● For self-improvement	Learn-to-Swim, The Inclusive Leader

4. It should be noted that—
- In many American Red Cross courses participants learn through reading, completing written exercises, watching videos, practicing skills and/or participating in group activities.
  - Participants learn in different ways and at different speeds and bring to class diverse characteristics that affect their ability to learn.
  - Some participants in American Red Cross classes may have specific disabilities, such as visual impairment, hearing impairment or limitations in mobility, strength and/or coordination.
  - No person shall be deprived of American Red Cross service because of his or her color, sex, race, religious beliefs, sexual orientation, national origin or physical or mental disability.
  - Instructors must be flexible and creative to accommodate the special needs of these learners and enable them to meet the objectives of the course.

5. Turn to the exercise in Lesson 4, “Diverse Characteristics of Learners,” on page 8 in the participant’s manual and complete the chart. Then check your answers against the bullets below.

<b>Characteristic</b>	<b>Instructor Plan/Response to Enhance Learning</b>
● Education	Use simple, clear terms. Check often for understanding. (R) Use visuals when possible. (S)
● Reading ability	Minimize reading of written materials. (S) Use visual aids when possible. (S) May need to give oral examinations. (S)
● Cultural background	Be aware and sensitive to cultural differences, and make certain other participants respect the differences during class.
● Strength/flexibility	Allow more rest between activities. Make certain body position is correct and help the participant adjust based on his or her physical ability.
● Language	Have an interpreter. Use culturally specific program materials, if available.
● Interest	Keep the pace moving. (M) Keep participants active and engaged. (M) Show interest yourself. (M, A) Know the audience and make the subject matter applicable, when possible. (M, A)
● Health/fitness	Do not push participants beyond their ability. Give frequent breaks. Make reasonable accommodations for participants with disabilities.
● Attitude	Do not ignore, but try to involve apparent ‘trouble maker’ in class. (M) Try to make course content applicable to participants’ lives. (A) If there is a problem, try to understand what it is and attempt to minimize the impact.
● Coordination	Repeat the demonstration several times. (R) Partner a participant that has mastered the skill with a participant who is having trouble.

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6. Turn to Appendix D, Americans with Disabilities Act—Course Modification Guide, on page 39 in the participant’s manual and read the general guidance for accommodating participants in Red Cross courses.
  7. Turn to Appendix E, Administering Oral Examinations, on page 43 in the participant’s manual and read the guidance for dealing with participants who may have reading or language difficulties.
  8. Be aware that instructor specialty courses provide specific information on how to make changes and accommodations in areas such as skills practice and testing, and local chapter Health and Safety Services program administrators can serve as a resource to instructors in planning and implementing accommodations to learners with special needs.

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## Lesson 5

### THE LEARNING ENVIRONMENT: THE INSTRUCTOR’S PERSPECTIVE

#### Lesson Objective

After completing lessons 4 and 5, instructor candidates should be able to describe ways an instructor can respond appropriately to individual and group learning needs.

1. Consider that the role of an effective instructor is to help students learn, and instructors have or can develop qualities and skills to fulfill that role.
2. Think back to previous teachers, instructors or facilitators you have known who helped you to learn. What are some qualities these effective teachers had that encouraged learning? Write them on page 9, “Characteristics of an Effective Instructor,” in the participant’s manual. Then look at some suggested possibilities listed below.
  - Good communication skills
  - Enthusiasm
  - Knowledge of the subject
  - Patience
  - Flexibility
  - Good listening skills
  - Positive attitude
  - Encouraging
  - Ability to make material interesting and challenging
  - Talent for engaging students in participating in the learning experience
  - Values the opinions and views of participants
  - Neutral and nonjudgmental
  - Treats all participants with respect

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3. Note that instructors in American Red Cross programs—
    - Are guided by the commitment to provide education in ways that are nonjudgmental and culturally sensitive.
    - Maintain a nonjudgmental perspective that accepts the right of all people to have their own values, attitudes and beliefs.
    - Are culturally sensitive, recognizing that groups and communities have their own sets of values, attitudes, beliefs and traditions that influence how group members understand and respond to the world.
    - Should give information and answer questions in ways that show respect for all participants.
    - Should not include their own values, attitudes or beliefs as they give information and answer questions, but should respond with factual information as contained in the specific course outline and instructional materials.
    - Possess the ability to communicate clearly.
    - Know that good communication involves both verbal and nonverbal components.
    - Are sensitive to the diversity participants bring to a class, and remember that different life experiences may affect whether the person receiving and processing information understands it in the way that is intended by the person communicating the information.
  4. Consider ways that an instructor can check to see if participants understand the information that has been communicated. Some suggestions are—
    - Asking for questions about what has been said.
    - Observing facial expressions or body language that indicates puzzlement.
    - Asking students to demonstrate skills that have been demonstrated to them.
    - Asking open-ended questions that encourage students to display their understanding of material.
  5. Think about what kind of nonverbal communication may enhance an instructor's communication with a class. Possibilities include—
    - Smiling, friendly demeanor.
    - Nodding, providing positive affirmation to participants.
    - Making eye contact with participants.
    - Leaning toward the participants.
    - Open arms, rather than crossing arms.
    - Moving among participants during activities.
  6. Read Appendix F, Instructional Aids, on page 45 in the participant's manual to become familiar with teaching tips for the effective use of instructional aids.
  7. You can be confident that, by the time you teach an American Red Cross course, you will have been well prepared. Remember that—
    - Instructors, like participants, are diverse in the abilities they bring to a class.
    - You will have an opportunity in the instructor specialty course to practice instructing/facilitating, and you will receive feedback on your strengths and areas for development.





- Opportunities are available in many Red Cross chapters for instructors to develop skills by co-teaching with experienced instructors and/or taking additional courses or workshops to improve skills.
  - Instructor’s manuals and the Fundamentals of Instructor Training (FIT) participant’s manual have valuable information that will help you gain knowledge and understanding of effective instructor qualities.
  - A critical element of what makes an instructor effective is the presentation of the course content, and you will have a firm grasp of various instructional strategies. Note that common instructional strategies used in Red Cross courses are—
    - Presenting information.
    - Facilitating discussions.
    - Facilitating task groups.
    - Teaching psychomotor skills.
8. Read over the following common instructional strategies used in American Red Cross courses to communicate course information and facilitate learning:
- All Red Cross courses include some presentation as part of teaching a course.
  - Most courses have a standardized lesson plan with the points of the presentation prepared and identified as “Key Points.”
  - Some courses, such as Learn-to-Swim and Canoeing, require that the instructor develop his or her own lesson plans—in these cases, it is important to prepare the presentation and key points prior to the course.
  - When preparing for and delivering a presentation—
    - Practice and time the delivery, speaking clearly and modulating your voice so that it is not monotone.
    - Arrange the seats so that all participants can see and hear.
    - Plan how you will stand, sit or move about in the front of the group, trying to remain as close to the participants as possible.
9. Watch the video segment, “Presentations” (4:51), and consider the advantages and disadvantages of using a presentation in class. Some **advantages** are that a presentation—
- Covers a large amount of information to convey facts.
  - Can be used with a large group of people.
  - Can be used when an expert needs to present material not readily available to participants.
- Some **disadvantages** to a presentation are that it—
- Does not encourage participant involvement.
  - Limits instructor’s assessment of participants’ learning needs.
  - Offers no or little opportunity for immediate feedback.
  - Allows little opportunity to assess participants’ understanding.

10. Review the following points regarding facilitating discussions and task groups:

- Facilitation is used frequently in Red Cross courses in discussions and task groups.
- Good facilitation of learning includes the use of push, pull and balance. They are defined as—



**Push**

When information flows mostly from the facilitator to participants.



**Pull**

When the facilitator engages participants in interactive exercises, asking and answering questions, or using other processes that actively involve participants in their own learning.



**Balance**

Ensuring that neither push nor pull overtakes the class so that neither you nor your participants are talking too much. Balancing may involve correcting misinformation, keeping on topic, keeping a nonjudgmental atmosphere, managing how participants speak to one another and minimizing distractions.

- Too much push and not enough pull leads to minimal participation and less likelihood of students remembering and applying information.
- Too much pull and not enough push may result in confusion, misinformation and misunderstanding.

11. Watch the video segment, “Facilitating a Discussion and Facilitating a Task Group” (9:23), and consider what push, pull and balance skills were used by the instructor in each segment. Review the following possible answers:

**Facilitating a Discussion:**

**Push:**

- Reviewing ground rules
- Giving key point information
- Summarizing information

**Pull:**

- Asking open-ended questions
- Listening to participants’ questions and comments
- Repeating or rephrasing to clarify a participant’s question

**Balance:**

- Mix of push and pull
- Managing time
- Keeping class on topic
- Maintaining a nonjudgmental perspective and climate



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### **Facilitating a Task Group:**

#### **Push:**

- Giving instructions for task groups
- Summarizing information

#### **Pull:**


- Asking open-ended questions
- Facilitating task group activities
- Repeating or rephrasing to clarify a participant's question

#### **Balance:**

- Mix of push and pull
- Managing time

### **12. Review the following material concerning teaching psychomotor skills in American Red Cross courses:**

- Many Red Cross courses focus on teaching participants how to perform psychomotor skills.
- Psychomotor skills are taught by providing an explanation and demonstration followed by guided student practice.
- Explanation and demonstration are important so that the participant understands what is to be performed and has a model to follow.
- Guided participant practice allows the participant to try the skill and, with corrective feedback, to make refinements and improve the skill.
- In most Red Cross courses that teach psychomotor skills, the course video provides a uniformly consistent explanation and demonstration of the skill.
- The video is followed by a skill practice session.
- During the skill practice sessions, participants are learning and perfecting skills.
- The skill practice sessions should include—
  - Direction and instruction.
  - Ample practice time.
  - Reinforcement from the instructor.
  - Corrective feedback.
  - Encouragement to ensure the participants' success.
- In general, skill practice sessions involve either instructor-led practice or reciprocal (partner) practice.
- Other types of skill practice, such as drills, task practice and station practice, are used in the specialty courses.
- You will have the chance to set up and “practice teach” a variety of types of skill practice during the instructor specialty courses.

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13. Watch the video segment, “Conscious Choking” (1:46), and refer to Appendix G, Sample Skill Practice Session, Conscious Choking Skill Sheet, on page 49 of the participant’s manual to see how a skill sheet is used to demonstrate a new skill. Also read the skill sheet in Appendix G, Sample Skill Practice Skill, Warm-up and Neck and Head Exercises, on page 51 in the participant’s manual. In a classroom setting, the instructor would—
    - First demonstrate the warm-up exercise once. Then slowly lead the participants through the warm-up exercise once.
    - Next demonstrate each exercise for the neck and head. Then slowly lead the participants through each exercise once.
  14. Refer to Appendix H, How to Run Skill Practice Sessions, on page 53 in the participant’s manual to learn how instructors set up and run skill practice sessions.
  15. Think about how you would manage a classroom. In addition to applying specific teaching strategies, an effective instructor must also have the ability to manage the class and provide a good learning environment. The instructor must manage the classroom, the participants and the learning process. Consider these suggestions on how an instructor might effectively manage a class and think of more if you can:
    - Make participants feel welcome and comfortable.
    - Have equipment ready for use at the start of the class.
    - Know the subject matter and the flow of the course.
    - Give clear, easy-to-understand directions.
    - Set up skill sessions in an organized manner, if applicable.
    - Give feedback appropriately.
    - Stay within the allotted time.
  16. Review these strategies, easily remembered with the mnemonic BASIC, that are used in all American Red Cross courses to help instructors provide a good environment for learning:
    - Bridging
    - Assigning tasks
    - Summarizing
    - Intervening
    - Climate setting
  17. Watch the video, “Effective Classroom Management” (8:24), and, for your own review, complete the following exercise (note that these are “open-ended” questions, a technique used in American Red Cross courses to encourage discussion and reinforce the learning process):
    - How would you describe bridging?
    - What was one new concept that was introduced to you in this video?
    - What is an example of how intervening was used in the video?

If you need to watch the video again to answer these question, do so.

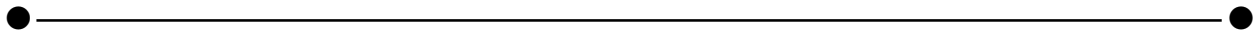


**18. Review the following points concerning providing feedback:**

- Feedback is a way to correct mistakes in a positive manner.
- There are two types of feedback that are effective in training: positive and corrective.
- Positive feedback is an acknowledgment of a correct participant response or action.
- It can be a gesture, a nod, a smile or a statement that gives positive feedback.
- Corrective feedback is given by identifying an error and giving the correction.
- Corrective feedback is done in a nonjudgmental and positive manner.
- In giving corrective feedback—
  - Identify the error or behavior in a nonjudgmental way.
  - Define the results.
  - Provide or describe the corrective action or lead the participant to provide his or her own correction.

**19. If it is feasible for you, in order to get an idea of how you will feel when you begin teaching a class, and to reduce some of the anxiety surrounding the practice-teaches that you will be doing in the specialty course, try “teaching” a short session with family or friends. Make a presentation of about two minutes on a topic you are knowledgeable on, such as serving a tennis ball, setting a table, or discussing your favorite dish. Consider the best instructional strategy for the topic. After you have done this exercise, think about—**

- How you felt about the experience.
- If you were able to apply any of the concepts learned so far in this self-study guide.
- What challenges you faced in this activity.



## **Lesson 6**

### **PERFORMANCE STANDARDS AND ASSESSMENT**


#### **Lesson Objectives**


After completing this lesson, instructor candidates should be able to—

- Recognize standard processes in American Red Cross courses for assessing participant progress and providing feedback.
- Respond appropriately to a specific learner concern.

**1. Be aware that—**

- In most American Red Cross courses, standards of performance are established. During courses, you will find yourself constantly evaluating the class progress and checking to see that—
  - Learning is occurring.
  - Course objectives are being met.
  - Participants are able to apply knowledge and skills to meet the objective.

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- At the end of the course, participants will be evaluated through a written tool—either a written examination or self-assessment. To assess the progress of participants’ psychomotor skills, evaluation takes place during the skill practice sessions.
  - Instructor’s manuals and guides for the specialty courses provide instructors with resources to—
    - Lead participants step-by-step through the skills.
    - Evaluate the participants’ abilities in performing the skills.
    - Check off skills as participants complete them.
  - Many courses that result in certification clearly identify for instructors in the program instructional materials the “critical” elements of motor skills, such as sequence, timing, duration and technique.
  - The skills must be demonstrated correctly by participants without coaching or assistance to complete course requirements successfully and receive a completion certificate.
  - These critical skill elements are often identified in a “Skill Chart,” “Critical Skills Chart” or as a “Critical Component” in the instructor’s manual and can help instructors focus on critical elements when evaluating their students’ skills performance.
  - Each participant must be able to demonstrate successfully the required skills in accordance with skill charts.
  - If a participant is having difficulty with performing a skill and you cannot easily correct the problem before the end of the course, counsel the participant and encourage enrollment in another class at a later date.
  - You will need to teach to the standard and test to the objective. Consider that—
    - The Americans With Disabilities Act (PL 101-336) has led to an increased awareness that people with disabilities and other conditions can perform such skills as first aid and CPR.
    - The skills needed to prevent injury or to save a life may need modification, but the result is the same.
    - This awareness challenges instructors to focus on the *critical* components of a skill that are needed to successfully complete an *objective*, rather than focusing on perfecting every part of a skill.
    - For example, a person with one arm cannot perform a “head-tilt/chin-lift” using two hands. However, he or she may be able to perform a modified “head-tilt/chin-lift” using one hand. The objective for the rescuer is to open the victim’s airway; the person with one arm may fully satisfy that objective without using a traditional technique.
    - Instructors should always teach to the *standard* (teach the skill exactly as represented in video, skill chart and/or participant’s manual), but be aware that participants may modify how a skill is accomplished and still meet the *objective*.

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2. Be sure you are familiar with Appendices G and H in the participant’s manual on pages 49–57. Look at Appendix I in the participant’s manual on page 59 and note that it is a blank Participant Progress Log for your use in teaching future courses should you need it.
  3. Understand that many American Red Cross courses require you to give a written or oral examination at the end. Generally—
    - Participants may not use course materials as a resource when taking the examination.
    - To pass the examination, participants must correctly answer 80 percent of the questions.
    - If a participant does not achieve a score of at least 80 percent, he or she has the opportunity to take an alternate examination.
    - In courses that do not include a certification with a validity period, a self-assessment is sometimes used.
    - A self-assessment is a tool designed to help participants’ measure their understanding of the material presented.
    - Participants are not asked to turn in a self-assessment, nor does the instructor grade it.
    - Instructors may allow participants who passed the exam to review questions they missed. Graded answer sheets and most exams must be returned to the instructor.
    - As with assessing psychomotor skills, modifications should be made in assessing knowledge for persons with disabilities.
    - Oral examinations may be given if the instructor determines that a participant has reading or language difficulty.
  4. Remember that Appendix E, Administering Oral Examinations, on page 43 in the participant’s manual (referred to in Lesson 4) provides some guidance for dealing with participants who have reading or language challenges.

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## Lesson 7

### AMERICAN RED CROSS STANDARDS OF QUALITY PERFORMANCE


#### Lesson Objective

After completing this lesson, instructor candidates should be able to identify ways the American Red Cross ensures quality and consistency in course delivery.

1. Understand that quality, consistency and standardized delivery of courses is a priority of the Red Cross. This ensures that all Red Cross course participants receive the same quality training regardless of the location or chapter in which the course is delivered. Red Cross courses are designed with lesson plans based on well-defined objectives. It is a responsibility of the instructor to follow the lesson plan when teaching and not stray from the course content or learning objectives.

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2. Note that in order to ensure standardized course delivery an instructor's manual or guide generally includes—
    - An administration section that—
      - Describes the organization of the program.
      - Provides administrative information on the training.
      - Helps prepare instructors to teach.
    - A teaching tools section that—
      - Contains specific course notes.
      - Outlines learning objectives.
      - Provides comprehensive lesson plans for conducting the course.
    - Appendices that contain written examinations and forms, such as participant course evaluations, and supporting information, such as administrative terms and procedures.
  3. Know that—
    - Some Red Cross courses require prerequisites for participating in the course.
    - The prerequisites could be—
      - Minimum age.
      - Certification in another course.
      - Successful completion of a pre-course session.
    - The prerequisites are established to ensure a minimum level of knowledge and/or skill that is necessary for the course.
  4. Be aware that, because the Red Cross is serious about the quality of its instructors, in most lines of service instructors will be asked to sign an *Instructor Agreement* that outlines commitments and expectations for both the Red Cross and the instructor. This agreement contains a Code of Conduct.
  5. Turn to and read Appendix J, Instructor Agreement and Code of Conduct, on page 61 in the participant's manual.
  6. Be aware that, in an effort to expand and improve the systems of delivering Red Cross Health and Safety programs and courses, many are taught by instructors in facilities and workplaces other than Red Cross chapters. These instructors are trained and authorized by the American Red Cross. Outside companies, organizations or individuals that provide Red Cross instructional programs are called “authorized providers.” Instructors who teach courses for authorized providers are still considered representatives of the Red Cross and must abide by the *Instructor Agreement* as if they were teaching a course directly sponsored by the local Red Cross. Authorized providers are significant contributors in expanding the reach of Red Cross courses.
  7. Turn to and read Appendix K, Authorized Provider Agreement, on page 65 in the participant's manual.



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8. Familiarize yourself with the records used to show that participants have completed a Red Cross course. These include the *Course Record* and *Course Record Addendum* forms, and other shorter forms including the *Water Safety Instructor Activity Report* and the *HIV/AIDS Education Instructor Activity Report*. You will learn when to use each type of reporting form in your specialty course. Refer to Appendix L, Record Keeping, on page 73 in the participant's manual for directions on how to complete each type of form and examples of courses and presentations appropriate for each form. Generally, local Red Cross chapters request the forms be turned in within 10 working days of completing the course.
  9. Consider reasons that careful record keeping is important, including the following:
    - Reporting statistics
    - Budget requests (critical information needed for funding by United Way and other organizations)
    - Ensuring that Red Cross performance standards are met
    - Documenting program impact in the community
    - Documenting course completion so the local chapter can verify completion in case course certificate is lost, or to supply information for employment
    - Documenting that course requirements were met and proper procedures were followed in case of legal questions
    - Documenting course activity for instructor reauthorization
  10. Review the following points concerning instructor certification and authorization:
    - Certification occurs when an instructor candidate successfully completes the instructor course in a specialty area and receives the original of the completed Instructor Certificate signed by the instructor candidate and the instructor trainer.
    - The candidate's signature on the Instructor Certificate indicates his or her willingness to conduct courses according to the requirements and procedures established by the American Red Cross.
    - The certification of an instructor indicates that all requirements have been met on the date that the instructor candidate completes the instructor course in a specialty area.
    - Certified instructors may not teach until they have applied for and received authorization from a chapter.
    - After successful completion of an instructor course, the new instructor may be authorized by a chapter to teach the applicable courses within its jurisdiction.
    - In the Health and Safety Line of Service, to become authorized and before a new instructor can teach, the new instructor and a chapter official must sign the Instructor Agreement.
    - As a new instructor, you should receive information on chapter specific issues, policies and procedures before teaching.
    - The chapter that initially authorizes an instructor to teach is often the instructor's unit of authorization.



- If an instructor wants to teach in another chapter’s jurisdiction, he or she must get permission from that chapter prior to teaching.
  - If an instructor teaches in another jurisdiction, it is his or her responsibility to provide copies of the Course Record to his or her unit of authorization.
11. Turn to Appendix M, Administrative Terms and Procedures, on page 83 of the participant’s manual to better understand administrative terms and procedures used in connection with Red Cross courses.
  12. Turn to and read Appendix N, Customer Satisfaction Questionnaire, on page 85 in the participant’s manual. These evaluation forms are completed at the end of the course by participants, giving them an opportunity to evaluate the process and content of the course and the instructor’s preparation and teaching ability. Forms should be completed anonymously and turned in before participants leave. This information is for your use, and the local chapter may also use the information. Do not forward these forms to national headquarters.
  13. Turn to the exercise in the participant’s manual on page 21, “Ensuring Quality and Consistency,” and complete the True/False quiz. Then check your answers—they should be: 1. F; 2. T; 3. F; 4. T; 5. T; 6. T; 7. F; 8. T; 9. F; 10. T.

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## **Lesson 8**

### **PUTTING IT ALL TOGETHER**

#### **Lesson Objective**

After completing this lesson, instructor candidates should be able to articulate how they can serve their communities.

1. Consider that—
  - After you complete your instructor specialty training and begin teaching, you will be a representative of the American Red Cross.
  - You may be the first Red Cross representative with whom your course participants have come in contact.
  - You will need to present yourself as an ambassador and a role model as you teach courses for the American Red Cross.
  - Ethics is an important part of your commitment to the Red Cross.
  - As a representative of the organization, it is important that you model the following fundamental standards of ethical behavior:
    - Tell the truth
    - Keep promises
    - Respect individuals
    - Be fair

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- 
- Each of us is responsible for maintaining the highest standards of ethics when we represent the American Red Cross.
  - No matter what your affiliation is with the Red Cross, as paid or volunteer staff, your actions should reflect the “Five Key Commitments.”
  - These commitments are—
    - Commitment to the *organization*, to help build and support it and its management;
    - Commitment to *customers*—those individuals whom we serve or teach, both internal and external to the organization;
    - Commitment to the *task* or mission, to keep the right focus, to be action oriented, to break work into achievable components, and to be committed to excellence in the achievement of that task;
    - Commitment to the *people*—individuals with whom you come in contact and the team with whom you work—to allow them to use innovative ideas and to show them positive concern and recognition for what they accomplish; and
    - Commitment to *yourself* as a “manager” of tasks, acting on constructive advice to learn and grow and develop your own talents.
  - These elements describe the commitments expected of paid and volunteer staff as they execute their responsibilities as Red Cross instructors.
2. Turn to and read Appendix O, Course Planning Checklist, on page 91 in the participant’s manual for a guide to planning to teach a course.
  3. Turn to and complete the exercise, “Serving the Community,” on page 24 of the participant’s manual.
  4. You now will need to take the Self-Assessment on pages 115–118 of this appendix. Use the answer sheet provided on page 112 at the beginning of the self-assessment. You may refer to this guide to complete the self-assessment. The self-assessment is not graded. It is for your benefit to reinforce your learning. The answer key follows the self-assessment in this appendix on page 119.
  5. After completing the self-assessment, read and sign the verification form at the end of this appendix on page 122 and return it to your local chapter. You will be given an *American Red Cross Universal Certificate* indicating “Fundamentals of Instructor Training.” Remember that you must complete an instructor specialty course *within one year* of the date of completion of this course, and that the Fundamentals of Instructor Training certificate has no expiration as long as your national or nationally approved American Red Cross instructor authorization remains current.

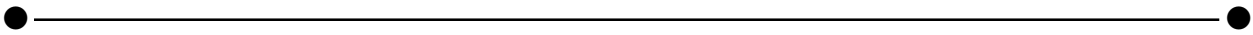


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**Self-Study Guide for Educators and Trainers  
Self-Assessment Answer Sheet**

**Lesson 2**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

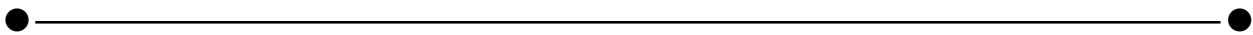


**Lesson 3**

4. \_\_\_\_\_  
\_\_\_\_\_

5. \_\_\_\_\_

6. \_\_\_\_\_



**Lesson 4**

7. a, b, c

8. a, b, c

9. a, b, c

10. a, b, c



**Lesson 5**

11. Climate Setting

12. Assigning Tasks

13. Bridging



---

14. Intervening

15. Summarizing

16. T F

17. T F

18. T F

19. T F

20. T F

21. T F

22. T F

23. T F

24.

25.

26.

27.

28.

29.

30.



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**Lesson 6**

- 31. \_\_\_\_\_
- 32. \_\_\_\_\_
- 33. \_\_\_\_\_
- 34. \_\_\_\_\_
- 35. \_\_\_\_\_
- 36. \_\_\_\_\_
- 37. \_\_\_\_\_
- 38. \_\_\_\_\_
- 39. \_\_\_\_\_
- 40. \_\_\_\_\_

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**Lesson 7**

- 41. \_\_\_\_\_
- 42. \_\_\_\_\_
- 43. \_\_\_\_\_
- 44. \_\_\_\_\_
- 45. \_\_\_\_\_
- 46. \_\_\_\_\_ and \_\_\_\_\_
- 47. \_\_\_\_\_

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**Lesson 8**

- 48. \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_ and \_\_\_\_\_.
- 49. \_\_\_\_\_
- 50. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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## Self-Study Guide for Educators and Trainers Self-Assessment

You may use the self-study guide text, participant's manual and appendices to complete this self-assessment. Record your answers on the answer sheet, page 112, and after you have completed the self-assessment check your answers against the answer key on page 119.

### Fill in the blanks:

#### (Lesson 2)

1. It is the mission of the American Red Cross to \_\_\_\_\_ and help people prevent, prepare for and respond to emergencies.
2. \_\_\_\_\_ is the founder of the American Red Cross.
3. Henry Dunant won the first Nobel Peace Prize for his work in establishing the International Red Cross after witnessing the suffering in the aftermath of the \_\_\_\_\_.

#### (Lesson 3)

4. List the seven guiding principles of the American Red Cross.
5. Its Congressional Charter requires the American Red Cross to provide relief to victims of disaster and \_\_\_\_\_.
6. A local chapter is governed by \_\_\_\_\_.

#### (Lesson 4)

#### Multiple choice:

7. Affective learning involves—
  - a. Change in attitudes and/or behavior.
  - b. Introduction of new facts, concepts and skills.
  - c. Introduction of new motor skills.
8. You might suspect that a participant has reading difficulties if he or she seems—
  - a. Inattentive.
  - b. Boisterous.
  - c. Nervous or apprehensive.
9. In giving an oral exam, you should—
  - a. Read the possible correct answers to multiple choice questions verbatim.
  - b. Ask questions so that the respondent can answer in his or her own words.
  - c. Coach the participant if it seems necessary.
10. In the mnemonic MARS that is used to identify strategies used in Red Cross courses, the letter A stands for—
  - a. Alliteration.
  - b. Action.
  - c. Association.



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**(Lesson 5)**

**Summarize these strategies used in American Red Cross courses that were demonstrated in the video:**

11. Climate Setting
12. Assigning Tasks
13. Bridging
14. Intervening
15. Summarizing

**True or false:**

16. T F One facilitation skill used in teaching Red Cross courses is “push,” that is, when information flows mostly from the facilitator to participants.
17. T F Another facilitation skill is “pull,” when the facilitator sets and maintains a climate for learning, includes an appropriate level of student participation and ensures that content is covered in ways participants can understand.
18. T F The third facilitation skill is “balance,” when the facilitator engages participants in interactive exercises, asking and answering questions or using other processes that actively involve participants in their own learning.
19. T F Guided student practice is a component of teaching psychomotor skills.
20. T F A skill practice session is not the place for corrective feedback.
21. T F When using transparencies, try to get as much text as possible on each line to conserve resources.
22. T F To demonstrate a psychomotor skill, you need either a skill sheet or a skill chart, but not both.
23. T F You will have a chance to set up and “practice teach” a variety of types of skill practice during the instructor specialty courses.

**Answer the following questions:**

The following circumstances may arise while you are teaching. Please describe how you would handle the situation.

24. **Scenario 1**—You are teaching a class that contains group exercises and a written examination. You believe that a participant in the course has reading difficulty. What would you do?
25. **Scenario 2**—In a class discussion, one participant while stating his opinion makes incorrect statements that are insensitive and/or hurtful to others in the class. What would you do?





26. **Scenario 3**—In a skill practice session, a participant is consistently practicing the skill incorrectly. Her partner is not correcting the errors. What would you do?
27. **Scenario 4**—You have given participants an assignment to be done in a task group. As you circulate to one of the groups, you hear one of the more outspoken class participants repeating the instructions incorrectly. How do you proceed to give feedback and redirect the group?
28. **Scenario 5**—While teaching a class, each time a break is given the participants return later than the allotted time. As a result, the class is running longer than planned. What do you do to provide feedback and to manage the timeline?
29. **Scenario 6**—You are teaching a course that includes the topic of preventing disease transmission. You ask the class, “Why do we need to wear gloves to provide first aid care?” A participant responds, “In case you need to help a street person.” How do you provide feedback to this comment?
30. **Scenario 7**—You are conducting a skill practice session on care for a conscious choking adult victim. You have given instructions for practice and have reminded participants not to give actual abdominal thrusts. You notice that two participants who came to class together are goofing around and performing actual abdominal thrusts on each other. How do you manage this situation?

**Fill in the blanks:**

**(Lesson 6)**

31. In courses designed to teach participants how to perform psychomotor skills, evaluation of those skills takes place during \_\_\_\_\_.

In many courses that result in certification, the “critical” elements of motor skills are identified in instructional material. These could include—

32. \_\_\_\_\_.
33. \_\_\_\_\_.
34. \_\_\_\_\_.
35. \_\_\_\_\_.
36. If a participant is having difficulty with performing a skill and you cannot easily correct the problem before the end of the course, counsel the participant and \_\_\_\_\_.
37. The Americans With Disabilities Act (PL 101-336) has led to an increased awareness that people with disabilities and other conditions can perform such skills as first aid and CPR. This awareness challenges instructors to focus on the \_\_\_\_\_ of a skill that are needed to successfully complete an objective, rather than focusing on perfecting every part of a skill.
38. In teaching psychomotor skills, often a \_\_\_\_\_ is used to keep track of participants’ successful completion of course skills.
39. If the course you are teaching requires that you give a written or oral examination at the end, participants must correctly answer \_\_\_\_\_ percent of the questions.



40. If a participant does not pass the exam, he or she may \_\_\_\_\_.

**(Lesson 7)**

41. Quality, consistency, and \_\_\_\_\_ of courses is a priority of the Red Cross.

An instructor's manual or guide generally includes—

42. \_\_\_\_\_.

43. \_\_\_\_\_.

44. \_\_\_\_\_.

45. Some Red Cross courses require prerequisites for participating in the course including \_\_\_\_\_, certification in another course and successful completion of a precourse session.

46. Records are used to show that participants have completed a Red Cross course. These include the \_\_\_\_\_ and \_\_\_\_\_ forms, and other shorter forms including the Water Safety Instructor Activity Report and the HIV/AIDS Education Instructor Activity Report.

47. \_\_\_\_\_ are authorized by the local American Red Cross chapter to teach American Red Cross instructor courses and the Fundamentals of Instructor Training (FIT) course or its national Health and Safety Services replacement within that chapter's jurisdiction.

**(Lesson 8)**

48. As an American Red Cross instructor, it is important that you model the following fundamental standards of ethical behavior: \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_ and \_\_\_\_\_.

49. There are \_\_\_\_\_ commitments you need to make before you become a Red Cross instructor. (Be sure you know what they are.)


50. Before you teach your specialty course, you need to, (you should be able to come up with six responses.


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**American Red Cross: Fundamentals of Instructor Training**  
**Self-Study Guide for Educators and Trainers**  
**Self-Assessment Answer Key**

1. provide relief to victims of disaster
2. Clara Barton
3. Battle of Solferino
4. Humanity, Impartiality, Neutrality, Independence, Voluntary Service, Unity, Universality
5. emergency communications and assistance to members of the Armed Forces and their families
6. a local volunteer board of directors
7. a
8. c
9. b
10. c
11. **Climate Setting**—Providing, at the beginning of the teaching experience, a framework in which effective learning can take place. It includes planning so that the learning environment has the required equipment and materials, but goes beyond the physical environment. It also involves planning your teaching strategy in such a way that a positive learning environment is established and maintained throughout the entire course.
12. **Assigning tasks**—An instructor function performed whenever students are asked to do an activity. The task may be an exercise, a game, a case study or a discussion. Tasks may be done in large or small groups, but in the Red Cross they are frequently done in small groups.
13. **Bridging**—Linking ideas from one section of the course to another, supporting learning by association. It connects ideas and allows for learning to be tied to other ideas and teaching.
14. **Intervening**—Stepping in during the course to ensure positive outcomes by clarifying a point; redirecting, strengthening or modifying the learning process; keeping the subject on track; helping the class to be more effective as a group; focusing on specific content; focusing on overall accomplishments or outcomes of the group; testing an individual student’s knowledge or understanding; providing feedback; providing the opportunity to ventilate feelings and closing a topic when time needs to be managed.
15. **Summarizing**—Used to clarify the key learning concepts or objectives presented or, in some cases, to test for learning. This is done at the closing of a session or segment of a course and helps to reinforce learning and gives a sense of closure to a segment or topic.
16. T
17. F
18. F
19. T
20. F

- 
- 
21. F
  22. F
  23. T
  24. Make certain you are clearly describing the directions for group exercises. If a participant appears to be having reading problems, speak to him or her privately. Offer to give an oral exam following guidelines as described in Appendix E in the participant's manual.
  25. Correct any incorrect statements. Immediately redirect the discussion and keep the class on track. At the next break, speak privately to the participant who made the statements explaining that his or her statements were inappropriate.
  26. Intervention is required. Provide corrective feedback and encouragement. Provide a demonstration of the skill for both participants to observe. Redirect them to follow the directions and illustrations on the skills sheets and to continue to practice the skill. Monitor the participants to make certain they are now practicing correctly.
  27. Indicate to the group that you wish to clarify your instructions for the task assignment. Direct the group back to any written instructions and re-explain the task. Ask if there are any questions about the assignment. Monitor the group to see if the situation is resolved.
  28. Set the tone by beginning the class on time. Let participants know how you are doing on schedule. Emphasize that longer breaks result in a longer class. Stick to the length of break time that you have stated. Begin recalling participants so that class can begin again on time. If necessary, speak to offenders privately.
  29. Remind participants that precautions must be taken when providing first aid care to anyone to prevent disease transmission.
  30. Move to the pair of participants and stop them immediately. This is an immediate safety risk. Speak to them personally about the safety risk of actually performing this skill on a person who does not need it. Lead them through the practice of the skill correctly (without actually performing abdominal thrusts). Reinforce their correct response with positive feedback.
  31. the skill practice sessions
  32. sequence
  33. timing
  34. duration
  35. technique
  36. encourage enrollment in another class at a later date
  37. critical components
  38. participant progress log
  39. 80
  40. take an alternate examination
  41. standardized delivery
  42. an administration section

- 
- 
43. a teaching tools section
  44. appendices
  45. minimum age
  46. *Course Record* and *Course Record Addendum*
  47. Instructor trainers
  48. tell the truth, keep promises, respect individuals and be fair.
  49. Five Key Commitments (Please refer back to Lesson 8 if you are unsure of what these commitments are.)
  50. Your responses should include the following:
    - Successfully complete the instructor specialty course
    - Become authorized by the local American Red Cross chapter to teach the course
    - Sign the *Instructor Agreement*
    - Sign an Authorized Provider Agreement (or be sure one has been signed by someone from your organization)
    - Register the course with your local chapter following local procedures
    - Review the specialty course written materials and videos



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## **Self-Study Guide for Educators and Trainers—Verification**

I, \_\_\_\_\_, hereby certify that I have completed all the steps listed in the Self-Study Guide for Educators and Trainers text, taken the Self-Assessment and verified my answers—correcting them, if necessary—with the answer key provided. I believe I have understood and successfully completed the requirements of the American Red Cross Fundamentals of Instructor Training course.

Signature \_\_\_\_\_ Date \_\_\_\_\_