Blue Lions

Instructional and Non-Instructional Interventions Proposal to Improve Human Performance

For

Negro League Baseball Museum

Team Name: Blue Lions
Recap of the problem being addressed

The Negro Leagues Baseball Museum (NLBM) located in Kansas City, Missouri is a famous destination for baseball fans. The museum was founded in 1990. It is a non-profit organization committed to conserve the history of the African American Baseball. The museum has seen great success in preserving the history and spreading the knowledge about the Negro Baseball League era among the baseball fans. However, the NLBM leadership believes that with each passing year, the connection between the patrons and the players from the Negro League is decreasing. The concern is that the lack of connection will have a negative effect on the number of museum visits. Leadership believe that providing good customer service will help create and sustain interest and connection between the new generation of baseball fans to the history of the Negro League Baseball. They also feel that improving customer service will provide existing patrons with a positive experience and help maintain their interest in returning to the museum.

To improve the customer service, leadership wants to invest in a training program for the museum employees and volunteers. The training should encompass customer service and background history training. Additionally, the leadership would like to have some recommendations for improving the museum’s existing training program. The client expects to generate proficient employees and volunteers who are skilled in providing excellent customer service and in initiating interest in the next generation regarding the Negro League Baseball. With this, the client expects to increase visits to the museum and thereby, increase the museum’s revenues.
Analysis

Needs Analysis

The Blue Lions’ consulting team will conduct a needs analysis to assess whether the needs expressed by the organization are actual needs and not wants or felt needs of the organization. Needs analysis will help us gauge if there is a gap between the employees’ and volunteers’ current and expected performance for history knowledge and customer service skills. Conducting needs analysis will also inform us whether the gap in performance is due to an instructional or a non-instructional problem. This will then guide us to decide whether to employ instructional design strategies or human performance technology strategies to improve performance and reduce the gap in performance. We plan to employ the Performance Improvement model developed by Van Tiem, Moseley, and Dessinger (2012) to analyze the need or opportunity of the organization.

We will conduct cause analysis to assess the environmental and individual causes for the performance problem. Based on the analysis, we will select, design, and implement performance improvement intervention which could be instructional, non-instructional, or both. Our team will then implement interventions, and conduct evaluations to check whether the interventions were effective in improving performance (see Figure 1).

During the needs analysis phase, the NLBM leadership will be asked to identify a subject matter expert (SME) who will be able to answer any questions about the organization when asked for by the Blue Lions’ consulting team. Instructional designers in our team will require access to some organization’s data (e.g. number of customers that visit per day during the peak tourist season, and any feedback they collect from the customers regarding their experience, among others). Therefore, we request the NLBM leadership to provide us access to the data and
allow our instructional designers to interview their current employees and the volunteers to learn about their perspectives on the identified problem.


**Figure 1.** Performance Improvement Model by Van Tiem, Moseley, and Dessinger (2012)

**Performance Analysis**

We will conduct performance analysis to assess whether the employees and volunteers require history and customer service training. A pre-test assessment will be used to measure their knowledge regarding the history of the museum and knowledge and skills regarding providing customer service to adults and children. This will be administered prior to commencing the training sessions. Employees and volunteers who do not achieve the set passing score (i.e. 85%) on the assessment will be required to complete the new training. Whereas, those who attain the passing score on the assessment will be excluded from the training. The result of this analysis will inform us about the population that requires training to improve their performance in the
organization. This will help reduce the cost of training by providing targeted training to only those individuals who need training. However, performance support will be available to all the employees and the volunteers. The type of support will depend on the performance analysis.

In addition to the pre-test, we (Blue Lions) will employ Gilbert’s 1978 Behavior Engineering Model (BEM) to assess the customer service performance problem (see Figure 2). Gilbert (1978) states that a behavior is a product of environment and individual characteristics. This model allows us to identify whether the gap in customer service performance is due to environmental or individual factors at information, instrumentation, and motivation level.

**Individual level.** We will investigate whether the employees and volunteers have the knowledge, capacity, and motives to perform the customer service task as per the organization’s expectation. Following are examples of the type of questions that will be addressed to understand if there are any problems at the individual level that may be obstructing employees/volunteers to perform well on the customer service task:

- Do the employees/volunteers have the training and the knowledge required to provide effective customer service?
- Do the employees/volunteers have the ability to provide customer service?
- Do the employees have the right attitude to provide good customer service?

**Environmental level.** We will investigate whether the organization provides the employees and volunteers the data, instruments, and incentives needed to perform the customer service task as per the organization’s expectation. Following are examples of the types of questions that will be addressed to understand whether the employees and volunteers have information, instruments, and motivation needed for performing well at the given task:

- Do employees/volunteers know what they are expected to do?
- Do the employees/volunteers have the tools and resources needed to complete the task?
- Do employees/volunteers receive any monetary or non-monetary incentives to motivate them to perform well on a given task?

**Figure 2.** Gilbert’s Behavior Engineering Model *(Image Courtesy: http://hpt2014.weebly.com/gilberts-bem.html)*

We will also conduct performance analysis to assess the workplace (i.e. Negro League Baseball Museum) to measure if there are any other causes that may lead to the degraded customer service performance or other performance problems that were not originally identified by the organization (e.g. lack of adequate standards, feedback, tools and resources required for the task completion).
Training Strategies

History Training

Background museum history training, customer service training, and competency and remediation are components that will be included in the employee and volunteer training. The history training will be presented using e-learning modules (see Appendix B). The history training will be available to the employees and the volunteers from the museum’s website. The employees and volunteers will be given a unique username that they will use to access and complete the online museum history training. By the end of the history training session, learners will be able to do the following:

- Describe the major events in the Negro League Baseball history.
- Describe how each major event of the Negro League Baseball was influenced by what was going on in the society.
- Describe the most influential players in Negro League Baseball history.
- Compare the Negro League players’ stats to that of the Major League players of the time.
- Describe the history of the Negro League Baseball Museum.

The history training will be self-paced. That is, employees and volunteers will be able to complete the training at any time of the day according to their convenience and can take as much time they need to complete the training modules. However, all employees and volunteers will be asked to complete the online training by a set date to ensure that the training is completed before the customer service training. This will allow all the employees and volunteers to be on the same page when they come to the museum to complete the in-person customer service training.

The employee and volunteer training will begin with history and background training (see Figure 3). Using the digital storytelling method, we will use video instructions to provide
information on the history of the museum to the employees. Digital storytelling involves telling stories using different digital media such as video, images, and audio. It usually is an amalgamation of graphics, recorded narrations, video, and text among others to present information on a given topic (e.g. enumerate historical events) (Robin, 2006).

**Figure 3.** Training Course Map.

Our team will develop a self-paced e-learning instructional course on the history and background of the museum by using Robert Gagne’s Nine Events of Instructions. This instructional strategy involves gaining learners’ attention, informing the learners about the instructional objectives, relating new information to learners’ prior knowledge, presenting the new material or information to the learners, provide learners guidance to store information in the long-term memory, present opportunity for learners to practice the new information and confirm their understanding, provide learners with immediate feedback on their performance, assess learners learning of the material to ensure whether the instructional objective was met at the end
of the instructional unit, and finally evaluate whether the learners are able to apply the new learned information to their jobs (Kruse, 2009). Figure 4 depicts the way in which Robert Gagne’s Nine Events of Instructions will be implemented in the History training program.

**Ganges 9 Events**
for NLBM History Training

1. Gain learner's attention (Presentation)
   - Videos, sorting activities and flip cards
   - Videos less than 10 minutes in length and relevant to the topic
   - Sorting activities allow the user to place information within the correct category

2. Instructing the learner of the objective (Presentation)
   - Full objectives to be provided at onset of lesson
   - Specific objectives to be shown at each lesson
   - Grading standards provided prior to quiz

3. Stimulating recall of prerequisite learning (Presentation)
   - Reading followed by video
   - Sorting activity will function as reinforcement
   - Feedback from knowledge check will provide specific information

4. Presenting the stimulus learning (Presentation)
   - Present history using various formats
   - Knowledge check directly addresses material

5. Providing learning guidance (Practice)
   - Sorting activity to classify examples and non-examples
   - Use of articles and visuals to make visual associations

6. Eliciting learner performance (Practice)
   - Use of higher-order thinking questions
   - New knowledge integration

7. Providing feedback about performance (Feedback)
   - Use of confirmatory and corrective feedback
   - Use of immediate feedback

8. Assessing the performance (Feedback)
   - Pre-tests and quizzes will evaluate learner performance and give learners a point of reference for self-evaluation and monitoring

9. Enhancing retention and transfer (Feedback)
   - Real-world examples, articles, and activities will be grouped together by subject

**Figure 4.** Application of Robert Gagne’s Nine Events of Instructions to the History Training.

The history training will be presented to the employees using the internet. In order to successfully complete the history training, employees and volunteers will be required to pass the end of training assessment by scoring 85% or higher. Employees and volunteers who are unable to attain the required passing score will be asked to revisit the module to learn the material. They will then be asked to retake the assessment. The assessment questions will be different from the
previous assessment as questions will be randomly generated from a pool of questions. This will be done to ensure that the assessment scores reflect learners’ knowledge and not practice effect.

Being cognizant to the fact that the volunteers are older adults who are around the retirement age, it is possible that the volunteers may not be comfortable with operating the e-learning courses and accessing the computer-based assessments. Therefore, volunteers will have an option to complete the e-learning module at the museum where the training representatives will help them operate the computer and help them navigate the e-learning module on museum history. Additionally, instead of computer-based assessment, a paper based multiple choice test will be employed to assess the volunteers’ knowledge about the history of the museum. Using scantrons to provide responses will help the trainers to provide immediate feedback to the learners. The passing score (i.e. 85%) will still remain the same. If the volunteers are unable to attain the required passing score on the assessment, then they will be asked to revisit the e-learning module and retake the assessment just like the asynchronous trainees. The employees and the volunteers who meet the requirements and successfully complete this part of the training will be allowed to proceed to customer service training.

Customer Service Training

All the customer service training will be presented at the museum. We propose employing the four-component instructional design (4C/ID) model to design the customer service training program for the museum employees and volunteers (see Figure 5). This model is chosen because it provides four components that are central to learning complex tasks (i.e. providing customer service). The following are the four components discussed in the model:

- Learning task: providing authentic whole-task training to facilitate learners with schema construction from concrete experience.
**Application.** During the customer service training, the learners will learn about how to conduct themselves in front of the customer, how to develop a rapport with the customers, how to provide effective customer service, how to handle customer enquiries, how to deal with customer problems, and how to work as a team to solve some customer service problems. The learning task component will allow trainers to organize the training in such a way that the learners first learn the simple tasks (i.e. how to conduct themselves in front of the customers) and then move on to completing complex tasks (i.e. how to work as a team to solve a customer service problems).

- Supportive information: providing information that supports learning and performance and bridges the gap between learners’ prior knowledge and the present learning task.

**Application.** The lecture material (i.e. PowerPoint presentation slides) will be presented to the learners during the customer service training. The instructional materials will always be available to the students throughout the training. Feedback will also be provided to the learners per training task to ensure that they are learning the material and are able to build a proper mental model for customer service task.

- Just-in-time information: providing information that is important for learning and performance.

**Application.** Corrective feedback will be provided during the training for the tasks that the trainees do not complete properly. The feedback will provide hints to the trainees to allow them to reach the designated end goal of the task. The hint will be in a form of an example that is similar to the task that the trainee is working on. Correct answers will not be directly given to the trainees to allow them to practice and work their way to reach the end goal of the given task.
Part-task practice: practice provided to the learners to facilitate rule automation among learners to increase automaticity (van Merriënboer, Clark, & de Croock, 2002).

**Application.** Participants will be presented with several practice sessions where they will be able to practice what they learned. This will be done to practice what they have learned to increase learners’ automaticity of rule application to the procedural tasks.

![Diagram of the 4C/ID model](image)

**Figure 5.** Four components of the 4C/ID model: (a) Learning task, (b) Supportive information, (c) JIT information, and (d) Part-task practice.

The employees and volunteers will complete the customer service training that will be based on the situated cognition theory. According to this theory, situations and activities are fundamental for learning and cognition. Brown, Collins, and Duguid (1989) stated that it is the situations that “co-produce knowledge through activity” (p. 32). Therefore, the customer service training will be provided at the museum in the authentic environment where the learners (i.e. employees and volunteers) will eventually transfer their learning in the real-world environment.
Employees and volunteers will first complete the instructional session of the customer service training where they will receive instructions on how to provide good customer service. They will then be asked to complete the practice session to practice what they have learned to increase the automaticity of the rule application for the customer service procedural tasks. Learners will receive immediate feedback on their performance. Upon completion of the practice session, learners will be asked to complete a practical assessment which will test their customer service knowledge and skill acquisition. During this assessment, learners will be asked to complete five different customer service tasks. Learners will be required to four out of the five tasks to pass the assessment. Learners who do not successfully pass the assessment will be asked to retake the customer service training. Those who successfully pass the practical assessment will be done with the training. They will receive a certificate of completion.

**Human Performance Technology**

**Job aids.** Job aids for providing customer service will be created for employees and volunteers to help them on their job post-training. The job aid will provide important information such as company’s customer service policies, customer service tips, and the common errors to avoid, among others so that employees and volunteers can access the critical information at the time when they need it to support or improve their job performance. The job aids will help improve the customer service from day one as employees and volunteers would not have to wait for the training to end in order to use these pieces of information to improve their performance on certain customer service tasks. The job aids will help reduce training time and training cost as the trainees will not have to waste time memorizing certain pieces of information as they can just refer to the job aids to access the required information. Example of a job aid is provided in Appendix A.
Videos

Based on the customer reviews online, the customers who visited the museum expressed their desire to watch more videos when they visited the museum. Specifically, they wanted to watch more videos and audios of the actual game that was played during the Negro League and also some interviews of the players from the league. Therefore, to address this non-instructional customer service problem, more videos will be developed and implemented at the museum to provide the experience that the customers expressed needs for. This will help increase customer satisfaction.

Website Redesign

The current website is not very user friendly. The potential customers of the museum who visit the website to learn more about the museum may not have a satisfying experience. This may not help in creating a good first impression on the potential customers. Therefore, redesign of the existing website is proposed to enable presenting information to the customers in an effective manner and to provide a user friendly (i.e. easy to use, navigate, and access the information) interface for customers. User experience designers in our design and development team will work with the web developers to redesign the museum’s website. The NLBM leadership will be asked to provide Blue Lion’s web developer access to their personal web server to make changes to their existing website.
The Morrison, Ross, and Kemp (2010) instructional design model will be employed to guide the design and development process of the training program (see Figure 6). We chose this model over other instructional design models (e.g. Dick and Carey model) because it provides a systematic approach to instructional design by putting the instructional design process in a continuous cycle which allows instructional designers to begin and end the instructional design process at any point. This makes it useful for large scale instructional design processes that involves multiple type of resources (Akbulat, 2007). It provides instructional designers more freedom to be creative in designing and developing instructions than the Dick and Carey model. It also considers instructions from the learners’ perspective and suggests instructional and non-instructional solutions for learning problems (Akbulat, 2007). Dick and Carey model is a “rigid” and “cumbersome” process when working with real-life instructional design problems (Akbulat, 2007). Hence, this model is selected for designing instructions for this project.

**Figure 6.** Morrison, Ross, and Kemp (2010) instructional design model. (*Image Courtesy:* https://educationaltechnology.net/kemp-design-model/)
Using the Morrison, Ross, and Kemp model we will first identify the instructional design problem at hand before designing and developing the instructions for the training program. Then, we will conduct learner analysis to identify the learner characteristics. This will be done to understand who the learners are (e.g. demographic information), the level of prior knowledge that they possess, their skills and abilities to use the technologies (i.e. computers). Then, we will conduct task analysis and will clearly state the instructional objectives of the training program. These steps will guide the design of the instruction.

We will sequence the content of the instruction to allow information to flow in a logical manner. We will employ instructional strategies to allow learners to master the material. The instructional message will be planned and delivered using an appropriate delivery medium. To evaluate the effectiveness of the instruction, we will develop the evaluation instruments and will administer them to the relevant audience. The outer ovals in the model incorporates different types of evaluations namely formative, summative, and confirmative evaluations along with revision that can be undertaken after or during the development process. Therefore, using this outermost oval, we plan to incorporate project planning and management of instructions, provide support services for the instructions, and implement the developed instructions.

**Instructional Technology to be Used to Implement the Training**

The instructional video will be created by the instructional designers. With the help of a computer, projector, and a white projector screen, the instructional video will be presented to the learners. The e-learning instructions will be developed using the Articulate 360 software and will be presented to the employees using the internet (see Appendix B). The e-learning module will be hosted on Canvas which is a learning management system (LMS). This LMS is an open resource which is available for free and will be accessible to the trainees from the Museum’s
website. Each employee will have a unique login to access their e-learning course. Customer service training instructions will be presented to the employees and the volunteers in a face-to-face setting using Microsoft PowerPoint Presentation tool.

**Project Timeline**

The project timeline is based on a 6-month period, beginning after the proposal approval date of October 28th, 2018. The project will begin on November 1st, 2018 and end by May 15th, 2019 to allow completion of the employee training prior to the beginning of the tourist season which extends from June 1st to August 30th, 2019. We did not include December 21-December 31 to account for the holiday season and availability of museum staff. This timeline will allow the instructional design team to conduct front-end analysis, design and develop the training materials, conduct formative evaluations and user testing to evaluate the design prototype and make necessary revisions to the design based on the results, and implement and institutionalize the training program. This time frame is based on 8-hour weekdays. The time needed to complete each phase of the project is depicted in the table below (see Table 1).

**Table 1**

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<tr>
<th>Phase 1</th>
<th>November</th>
<th>December</th>
<th>January</th>
<th>February</th>
<th>March</th>
<th>April</th>
<th>May</th>
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<tbody>
<tr>
<td>Analysis and Evaluation of current materials</td>
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Tasks and Deliverables for each Phase

Phase 1 (11/1/2018 to 12/20/2018)

Analysis phase will include needs analysis, learner analysis, task analysis, and evaluation of the current materials.

**Deliverable:** Design document outlining course of action and theoretical
Based on the analysis, the following will be included:

- Proposed message design
- Instructional strategies
- Description of contexts to be included

Phase 2: 1/1/2019 to 2/28/2019

Design and development of the training materials (i.e. prototype).

**Deliverable (1 - Jan. 20):** Storyboard which includes specific objectives, subject matter content, and description of learner navigation. Upon approval and revision, we will prepare:

**Deliverable (2 - Feb. 28):** Prototype of online module and facilitator/participant guides for face-to-face portion, including evaluation and assessment materials.

Phase 3: 2/1/2019 to 5/10/2019

Evaluation and revision of the training materials. This will be an ongoing process.

Phase 4: 4/1/2019 to 5/15/2019

Implementation of the training program (soft launch, support services).

**Deliverable:** Final complete online modules and physical materials for face-to-face training.

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**Program Evaluation Plan**

After the training has been delivered to the employees and the volunteers, we will assess the training effectiveness by measuring whether the trainees like the training, whether they learned the information or acquired the skills taught to them, whether the trainees apply the newly learned knowledge and skills in their job, and whether the organization benefited from this training by measuring the return on investment. The Kirkpatrick model will be best suited to measure these evaluation objectives and therefore, it will be employed to evaluate the training effectiveness. This model measures four areas in a sequential order as follows: reaction, learning, behavior and results.

Reactions level measures learners’ opinions about the training program (i.e. whether they liked the training or not). Learning level measures learners’ learning and knowledge acquisition from the training (i.e. did the learners learn what they were required to learn from the training). Reaction and learning will be measured immediately after the training to measure the effectiveness of the training. Behavior level measures change in learners’ behavior form training,
and results level measures the impact of training on the organization’s performance (Guerra-López, 2008). Behavior and results level of evaluation will take place after three months of the training. This is because we would like to give employees and volunteers some time to apply what they have learned from the training to their jobs to see whether the training had an impact on their job performance and on the organization’s performance. The results obtained from the evaluation will help us decide if this training program should continue and if we need to make any changes to the program.

**Funding/Budget and Staffing Requirements**

The proposed budget covers the 6-month period and is estimated to cost $69,450. This figure includes staff, materials, and all other components needed to complete the project within the allotted time frame. The budget is inclusive of the instructional (i.e. training) and non-instruction (i.e. Human Performance Technology) interventions that will be designed and developed to improve employees’ and volunteers’ knowledge about the history of the Negro League Baseball and the museum; and their skills in providing effective customer service. Blue Lions already owns program license for Articulate 360 that will be used to develop the e-learning modules for the history training. Therefore, the cost of Articulate 360 will not be billed to the client (i.e. NLBM) and thereby, not included in the budget.

The focus of the non-instructional intervention will be to improve workplace components to support improvement in customer service and that eventually improves customer satisfaction. Our proposed interventions take a holistic approach to resolve the customer service issues to help connect the new generation of patrons to the Negro League Players. That is, we will not just consider the customer service problem or the disconnect problem at the employee or the volunteer level, but will rather take a holistic view at the problem and will fix all the things
that align with each other to enable the museum to provide excellent customer service. Therefore, the focus is on the entire organization as a whole and not just on a single part of the organization (i.e. employees or volunteers). Table 2 identifies these components and their cost.

We strongly believe that the Negro League Baseball Museum (NLBM) leadership will observe a marked improvement in the employees’ and volunteers’ knowledge of the history of the Negro League baseball and the museum; and in the skills level for providing excellent customer service. With the proposed instructional performance improvement intervention, we estimate that approximately 90% of the employees and volunteers will be proficient in providing good customer service. We also estimate that with the proposed non-instructional intervention, most if not all prospective customers who visit the museum website will be able to easily access the information that they are looking for about the website. Additionally, the customers who visit the museum will also have a satisfying experience at the museum. Happy and satisfied customers will then spread the word among their friends and families. This will lead to increase number of customer visits which in turn will lead to increased museum revenues. It is estimated that the performance intervention cost will be recovered by the end of the first upcoming tourist season.

Table 2

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<th>Budget for training and non-training intervention.</th>
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<tr>
<td>Pre-design Phase (Needs analysis, learner analysis, etc.)</td>
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<td>Instructional Designer</td>
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<td>Design Phase</td>
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<td>Instructional Designer</td>
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<tr>
<td>Development of Training Intervention</td>
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<tr>
<td>Instructional Developer for developing e-Learning module and other training materials (i.e. PowerPoint Presentation, assessments, etc.)</td>
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<td>Role</td>
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<td>----------------------------------------------------------------------</td>
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<tr>
<td><strong>Development of Non-Instructional Performance Improvement Intervention</strong></td>
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<tr>
<td>Web Developer</td>
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<tr>
<td>Instructional designer developing online job aids</td>
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<tr>
<td>Video Instructions development &amp; production</td>
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<tr>
<td>Web developer for website redesign</td>
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<tr>
<td>User experience designer/ developer (website redesign)</td>
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<tr>
<td><strong>Implementation Phase</strong></td>
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<tr>
<td>Instructional Designer</td>
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<tr>
<td>IT Support</td>
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<tr>
<td><strong>Program Evaluation Phase</strong></td>
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<tr>
<td>Formative evaluation (i.e. Usability testing, participant incentives)</td>
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<tr>
<td><strong>Miscellaneous</strong></td>
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<tr>
<td>Supplies (e.g. paper, photocopy, etc.)</td>
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<td>Computers/laptops for training at the museum</td>
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<tr>
<td>Travel Expense (for analysis and implementation)</td>
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<td><strong>Total</strong></td>
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References


5 Keys of Hospitality
Through Customer Service

Beyond being in the business of education, museum attendants are agents of hospitality. Here are 5 keys to recall to help you remember the factors involved in providing hospitality through customer service.

01 Attitude
- Prior to entrance, you should have a positive attitude about the incoming patrons
- In difficult situations, maintain a positive attitude since your behavior is a reflection of the museum

02 A Smile For All
- Have a smile prepared as the patrons enter
- Always keep a pleasant facial expression through the tour

03 Anticipate Needs
- Identify any accessibility needs when the patrons enter
- Determine and act quickly on the needs you identify

04 Patience
- Explain information as needed, speak up and repeat if asked or if necessary
- Take time to understand a question or request, then act promptly

05 Attention
- Always give your group full attention
- Use verbal and physical cues to let them know you are listening and care about their enjoyment
Appendix B

A sample of the online history training has been developed. Please click on the link below to view the history training prototype.

https://rise.articulate.com/share/VXfd5HA5Vd9Tib_wrfxACxYT04J8lba2