

# FACILITATING IN-PERSON TRAINING

SAFETY FIELD GUIDE

## ABOUT THIS FIELD GUIDE

During the COVID-19 quarantine, the immediate focus was on how to keep employees safe and the shift to fully remote work. In the absence of a shared, physical workspace, employee communication, collaboration and training had to be conducted virtually, almost overnight. Now, as we move towards our post-initial lockdown ways of working, we are preparing for the inevitable move back to the office and the instructor-led training (ILT) classroom.

The demand for virtual and online training will certainly continue to increase, but for certain skills, job functions and organizational learning cultures, there will always be a need or preference for in-person ILT. CLS developed this field guide because our clients are beginning to schedule in-person training sessions again and we wanted to proactively prepare our trainers to return to in-person classroom training, safely, in this next “normal.”

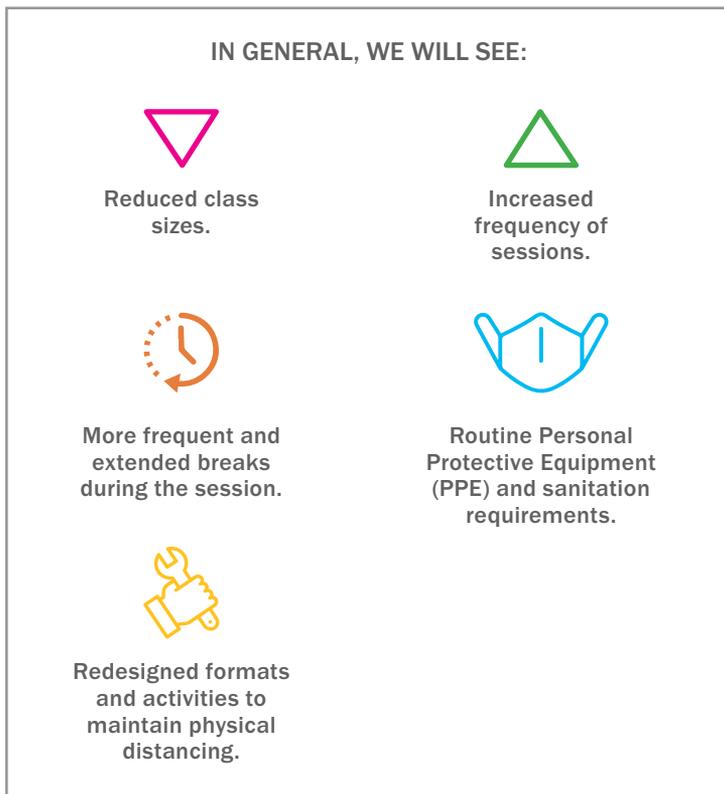
**NOTE:** This handbook is not intended to promote a premature or accelerated return to in-person training. We are providing it as a resource that can be utilized when (or if) your organization reinstates this training modality.

The guide provides recommendations for how to adjust your content and activity formats to maintain alignment with CDC safety protocols and still achieve your training outcomes. In addition to following your company-specific protocols, be sure to stay current on the CDC guidelines as the COVID-19 situation evolves.

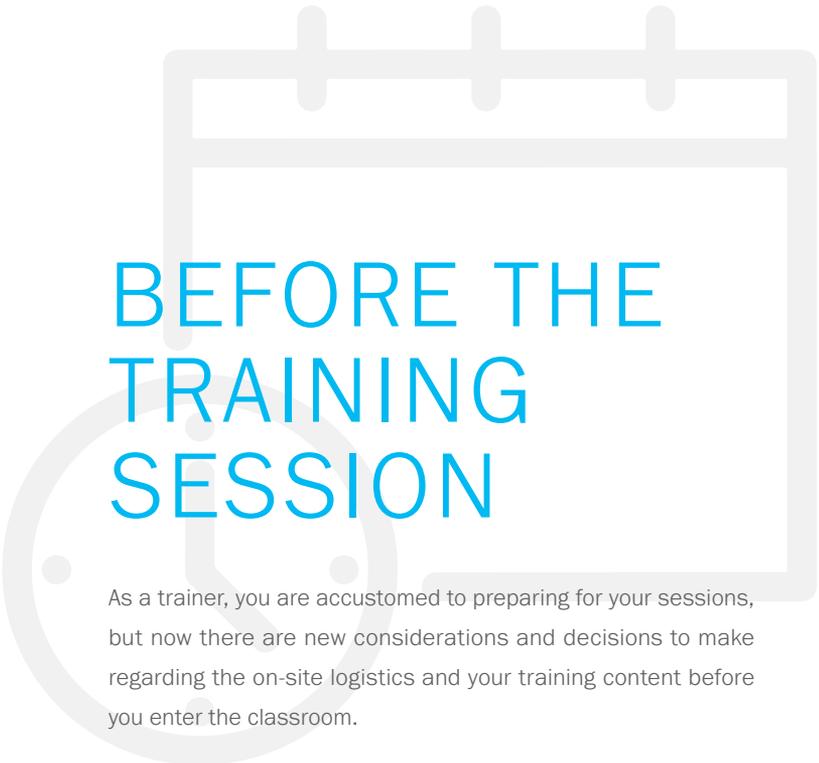
If your organization has not yet established the safety protocols for in-person training, the information in this guide may serve as support to help define them. The CDC links provided in this guide should be referenced frequently, as the COVID-19 situation and CDC recommendations continue to be updated.

# COVID-19 IMPACT ON INSTRUCTOR-LED TRAINING

A significant benefit of the ILT modality is the peer learning that is generated through the interaction and engagement with participants and instructors in the same physical space. That type of interaction and engagement can still be achieved in a physically distant, touch-free, sanitized training environment, but it will require changes to ensure the safety of all involved.



All of these changes directly impact what you need to do as a facilitator before, during and after the ILT session.



# BEFORE THE TRAINING SESSION

As a trainer, you are accustomed to preparing for your sessions, but now there are new considerations and decisions to make regarding the on-site logistics and your training content before you enter the classroom.

## On-Site Logistics

There are some key questions you can ask about the physical space and the COVID-19 operational guidelines that are in place to ensure you are prepared to maintain compliance while you are on-site.



**Venue Configuration:** Depending on the training location, the room size and seating configurations, the number of participants allowed in each session will vary.

- What is the seating arrangement? Tables or conference-style seating?
- How many people seated at a table will accommodate at least 6 feet (2-arms' length) between participants?
- Is there supplemental space available, such as smaller breakout rooms that will accommodate small groups/partner activities with physical distancing?



**PPE Requirements and Availability:** What PPE is required for the facilitator and participants? Are those materials available or do you need to provide them? Examples of PPE that may be required include:

- Masks/face coverings
- Plexiglass
- Body temperature screenings/thermometers
- Cleaning supplies, disinfectant wipes and hand sanitizer



**Signage:** Ensure that clear communication and direction about COVID-19 guidelines and managing access points (entry/exit, foot traffic, restricted areas, prevention, etc.) are posted for participants in the appropriate locations. Free resources such as posters and signage can be accessed via this link: [CDC Printable Signage](#).



**Breaks/Meals:** In public gathering areas, use signs or tape marks on the floor, 6 feet apart, to indicate where participants are to stand and sit when using vending or beverage machines. Replace high-touch shared items, coolers, buffet-style meals and snacks with individually packaged items or arrange for contactless delivery of pre-packaged meals with disposable serving items (utensils, napkins, food containers).



**Materials:** Changes to the way you conduct activities may require additional items or quantities that are not typically included in the program materials or on-site. For example, when using the flip chart or whiteboard, participants should use individual colored markers that are not shared among other participants or facilitators. Determine your needs in advance so you can prepare accordingly.

**TRAINER TIP:** Keep a training kit stocked with the following items in the event you are on-site without the necessary supplies: approved disinfectant wipes, face coverings, thermometer and hand sanitizer.

## Pre-Session On-Site Checklist

Connect with your contact at the training site prior to the session to ensure you are aware of the COVID-19 prevention and mitigation processes that are in place. Use the Pre-Session On-Site Checklist as a guide and include any additional information that is specific to program and location.

### PARTICIPANTS

What is the number of confirmed participants?

### VENUE CONFIGURATION

**Room Occupancy** (with social distancing)

**What is the seating configuration?**

- |  |  |
|--|--|
| <input type="checkbox"/> Theater                     | <input type="checkbox"/> Conference Table    |
| <input type="checkbox"/> Classroom (Tables or Desks) | <input type="checkbox"/> Round/Square Tables |
| <input type="checkbox"/> U-Shaped Table              | <input type="checkbox"/> Other               |

**Is the seating:**      Fixed      Adjustable

**If using tables**, how many people can be accommodated with at least 6 feet (2-arms' length) between participants?

**Supplemental spaces:** What spaces such as smaller breakout rooms or hallway areas, are available that will accommodate small groups/partner discussions with physical distancing?

### SIGNAGE

What signage is available?

## Pre-Session On-Site Checklist

### PERSONAL PROTECTIVE EQUIPMENT REQUIREMENTS

**Facilitator(s):**

**Participants:**

What type of PPE is provided?

What PPE are participants/facilitators responsible for bringing?

### BREAKS/MEALS

What are the arrangements for food and beverages?

### MATERIALS

What program materials (flip charts, whiteboards, colored markers, etc.) are needed?

Document any additional items or program materials you will need to bring with you to the session.

## Training Content

Prior to the session, take time to think through all the elements of your program to determine what needs to change based on the most current physical distancing and minimal touchpoint protocols.



**Agenda:** At a minimum, plan to adjust the agenda to allow for more frequent and extended breaks for the duration of the session. This will enable you to stagger the number of people entering and exiting the restrooms, training room and break areas and allow opportunities for frequent hand washing and sanitizing high-touch surfaces. With fewer participants in a class, some sections of the program may move more quickly, which could potentially balance out the increased number of breaks.



**Activities:** An interactive ILT session should provide multiple opportunities for participants to interact and engage with each other, usually through a combination of varied table-group activities, peer-coaching/partner discussions, group presentations and role-play exercises. To conduct these activities safely and successfully, participants will need to follow rules for physical distancing and not sharing materials, such as activity cards, handouts or markers. This may require that you provide instructions that are different from what is noted in the participant materials and have extra copies of materials available. Use the Activity Adjustments Worksheet to plan how you will redirect participants during the session.



**Participant Materials:** To limit the number of people who physically handle the participant materials, arrange to have workbooks, handouts, job aids, etc. individually packaged/shrink-wrapped. When possible, provide digital materials that participants can access on their smart phone, tablet or laptop. If your program includes personalized self- or

multi-rater assessments that are typically distributed at the session, consider having the assessments delivered directly to participants prior to the program.

**TRAINER TIP:** If any materials are sent directly to participants, send a reminder that they are responsible to bring their materials with them to the program.

## Options for Activity Adjustments

The options provided are intended as general guidance. The adjustments you will need to make will depend on your program content, design and materials. Be sure to refer to your organization's requirements and the current CDC physical distancing and COVID-19 prevention and mitigation resources to confirm compliance.



### Partner/Triad Role-Play

- If seated, chairs should be positioned 6 feet apart and participants should not switch or change seats.
- If standing, participants should be separated by 6 feet.
- Participants should work with their same role-play partner(s) for the duration of the session.
- If alternating roles, participants should have the role-play activity cards or handouts they need for each role so they don't exchange materials.
- If allowed, make photocopies of materials that can be discarded after use or ask participants to write the information in their workbook.
- When maintaining physical distancing, participants will need to speak more loudly, which will increase the volume in the room. If

noise becomes an issue, direct participants to other open areas, such as a hallway, breakout room or lobby, where they can maintain physical distancing.

- ❑ After each activity, collect any necessary course materials and clean them with disinfectant wipes.



### **Partner/Peer Coaching Discussions**

- ❑ If seated, chairs should be positioned 6 feet apart and participants should not switch or change seats.
- ❑ If standing, participants should be separated by 6 feet.
- ❑ Participants should work with their same partner for the duration of the session.
- ❑ When engaging in a one-on-one conversation that focuses on challenging situations, interpersonal conflict or sensitive or confidential topics, the space to talk privately is important and appreciated. Direct participants to available areas outside the classroom, such as a hallway, breakout rooms or lobby, where they can engage in a private discussion while maintaining physical distancing.
- ❑ If timing is an issue, consider positioning the exercise as a post-training sustainment activity where participants commit to meet with their partner (or manager) virtually.



### Small-Group Discussions/Activity

- If seated, chairs should be positioned 6 feet apart and participants should not switch or change seats.
- If standing, participants should be separated by 6 feet.
- Participants should work with their same small group for the duration of the session.
- If the small-group activity includes program materials, participants should not exchange or share materials.

**TRAINER TIP:** With a reduced class size and fewer participants in a small/table group, frequent small-group discussions may start to feel redundant, especially when participants are not able to change groups. Consider where you can replace small-group discussions with large-group discussions to expose participants to a wider range of insights and maximize their engagement.



### Team Presentations

- If seated, chairs should be positioned 6 feet apart and participants should not switch or change seats.
- If standing, participants should be separated by 6 feet.
- Participants should work with their same partner for the duration of the session.
- When engaging in a one-on-one conversation that focuses on challenging situations, interpersonal conflict or sensitive or confidential topics, the space to talk privately is important and appreciated. Direct participants to available areas outside the classroom, such as a hallway, breakout rooms or lobby, where they can engage in a private discussion while maintaining physical distancing.

- ❑ If timing is an issue, consider positioning the exercise as a post-training sustainment activity where participants commit to meet with their partner (or manager) virtually.



### **Rotation/Station Activities**

- ❑ Participants should be divided into groups of no more than four, standing 6 feet apart, with groups separated by 6 feet.
- ❑ One participant from each team is the scribe who will document the team's input on the flip chart.
- ❑ When rotating to flip chart/whiteboard stations for peer review, participants should travel in their assigned groups, with the same designated scribe.
- ❑ The scribe is the only person who writes on the flip chart with their assigned marker.

## Activity Example

(from *Situational Leadership®: Building Leaders*)

### Performance Readiness® Flip-Chart Rotations

For this activity, the facilitator places four flip charts in different parts of the classroom, each labeled with a different Performance Readiness® level (R1-R4). The class is divided into four groups and each group is provided a different colored marker.

ORIGINAL DESIGN	ADJUSTED ACTIVITY
<p>The groups start at their assigned flip chart and participants have 3 minutes to write the behaviors they associate with that Performance Readiness® level on the flip chart.</p> <p>After 3 minutes the groups rotate to the next flip chart and, using the same colored markers, add three new behaviors to the list. The groups repeat that process twice and then return to their original flip chart for the debrief.</p>	<p>Instruct the groups to choose one participant from each group to be the scribe. The scribe is the only person who writes on the flip chart with their assigned marker.</p> <p>Direct the groups to return to their seats after the last rotation and conduct a large-group discussion to debrief each Performance Readiness® level.</p> <p>If the class size will not accommodate groups of four or less at a flip chart, the facilitator could assign table groups one or two Performance Readiness® levels and conduct a large-group debrief to solicit input from the class.</p>



### Movement/Demonstration Activities

- Participants should be separated by 6 feet.
- If movement around the room is intended to indicate participants' responses to specific questions, participants can sit or stand in place, applaud or use clappers or bells that can be sanitized after use.
- Illustrate participant responses from the front of the room by using items like colored sticky notes with participants' names or initials.
- Consider using a polling tool that participants can respond to on their smart phone or tablet and display results in real time.

## Activity Example

(from *Situational Leadership®: Building Leaders*)

### Hobby Activity

ORIGINAL DESIGN	ADJUSTED ACTIVITY
<p>In the Hobby activity, multiple participants typically stand in close proximity and simultaneously respond to questions about their ability and willingness to perform various hobbies. They indicate their response by physically moving to a location in the classroom designated as High, Medium or Low for each hobby.</p>	<p>Ask a small group of participants to volunteer to demonstrate the activity for the larger class.</p> <p>Write participants names on sticky notes and move them to High, Medium or Low on the wall for each task.</p>

## Activity Adjustments Worksheet

Use the worksheet as you review your content to map out the adjustments you will make for your session. We've pre-filled an example for you to work from or model after.

### ACTIVITY EXAMPLE

**Activity Type:** *Partner-/Peer-Coaching Discussion*

**Timing:** *25 minutes total*

*10 minutes per person + 5 minutes for partners to find a location*

**Details:** Document the directions you will communicate to participants. *Partners move to a location where they can sit or stand 6 feet apart to discuss their action plans but do not hand over their materials. If meeting outside the training room, partners will need to keep track of the time to ensure both are able to discuss their plans and exchange feedback.*

**Materials:** Document the materials and quantities, if applicable, each participant will need.

*Individual Participant Workbooks*

*Pen/pencil*

### ACTIVITY 1

**Activity Type:**

**Timing:**

**Details:** Document the directions you will communicate to participants.

**Materials:** Document the materials and quantities, if applicable, each participant will need.

## Activity Adjustments Worksheet

Use the worksheet as you review your content to map out the adjustments you will make for your session.

### ACTIVITY 2

**Activity Type:**

**Timing:**

**Details:** Document the directions you will communicate to participants.

**Materials:** Document the materials and quantities, if applicable, each participant will need.

### ACTIVITY 3

**Activity Type:**

**Timing:**

**Details:** Document the directions you will communicate to participants.

**Materials:** Document the materials and quantities, if applicable, each participant will need.

## Activity Adjustments Worksheet

Use the worksheet as you review your content to map out the adjustments you will make for your session.

### ACTIVITY 4

**Activity Type:**

**Timing:**

**Details:** Document the directions you will communicate to participants.

**Materials:** Document the materials and quantities, if applicable, each participant will need.

### ACTIVITY 5

**Activity Type:**

**Timing:**

**Details:** Document the directions you will communicate to participants.

**Materials:** Document the materials and quantities, if applicable, each participant will need.

## Activity Adjustments Worksheet

Use the worksheet as you review your content to map out the adjustments you will make for your session.

### ACTIVITY 6

**Activity Type:**

**Timing:**

**Details:** Document the directions you will communicate to participants.

**Materials:** Document the materials and quantities, if applicable, each participant will need.

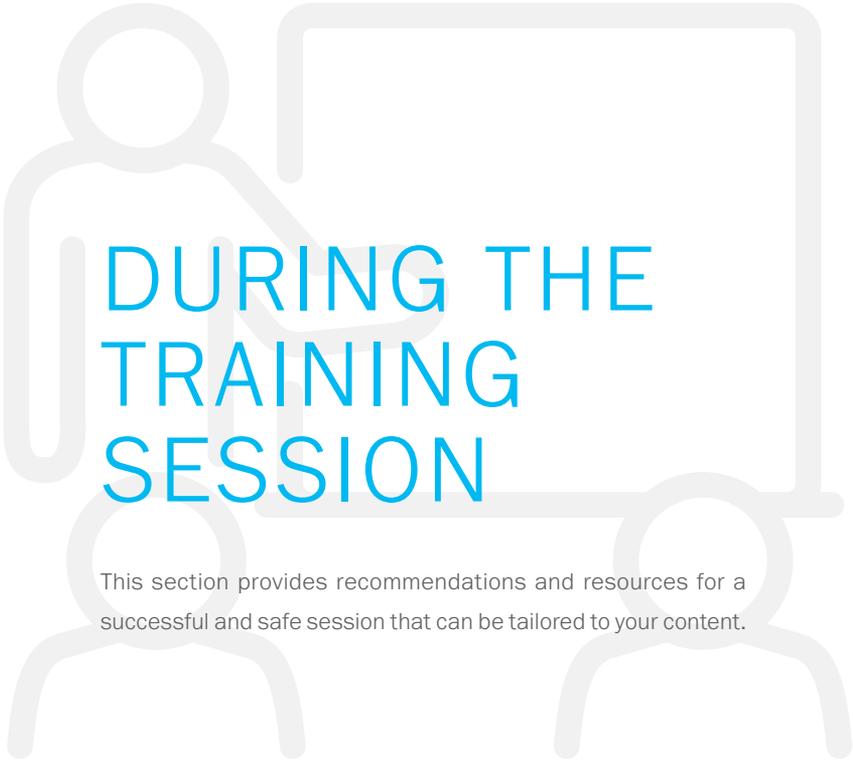
### ACTIVITY 7

**Activity Type:**

**Timing:**

**Details:** Document the directions you will communicate to participants.

**Materials:** Document the materials and quantities, if applicable, each participant will need.

A light gray illustration of a training session. A person on the left is pointing at a large whiteboard. Two other people are seated in front of the whiteboard, looking towards the presenter. The text 'DURING THE TRAINING SESSION' is overlaid in blue on the whiteboard area.

# DURING THE TRAINING SESSION

This section provides recommendations and resources for a successful and safe session that can be tailored to your content.

## Setup

Plan to arrive early or the day before the session, if possible. Use the On-Site Setup Checklist as resource and follow any facility guidelines required on-site.

### On-Site Setup Checklist

#### ROOM SETUP

- Reconfigure the seating as needed to achieve 6-feet physical distancing between participants.
- Remove extra chairs, if possible.
- Place one set of packaged participant materials, a marker and a name tent at the designated seat.
- Measure and place X indicators on the floor with signage or tape for standing activities.
- Follow cleaning and disinfecting guidelines at the location and current CDC recommendations.



**Opening the session:** Establish expectations and ensure participants are comfortable with the guidelines at the beginning of the program. Conduct an opening activity that will facilitate introductions and communicate the COVID-19 protection and mitigation policies for the session.

## Seated Scavenger Hunt

(optional activity)

Ask participants to “find” specific items that are related to the COVID-19 protective measures that are in place for their session. Give participants 3–5 minutes to write down everything they noticed when they entered the building and what they see in the training room (e.g., signage, cleaning supplies, equipment, etc.) that is there for the purpose of their protection. This could include anything they observed in the lobby, restrooms, hallway, break areas, etc. Debrief by asking individuals to share what they identified and reinforce the complete list of rules.

**Examples of participant responses could include:**

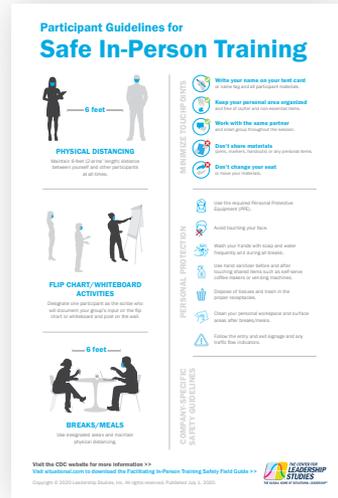
- Room entrance sign
- Room exit sign
- Floor markings
- Foot-traffic patterns
- Hand sanitizer on the tables
- Masks
- Plexiglass
- Separated seating by 6-feet minimum
- Signage related to COVID-19 prevention, protection, symptoms, personal hygiene
- No extra seating



## Provide Participant Guidelines:

Provide a resource that participants can reference during the session to reinforce the COVID-19 protective guidelines. Document and post them on a flip chart or include as a handout in the participant materials. You may also use the example provided and add any information that is specific to your circumstances.

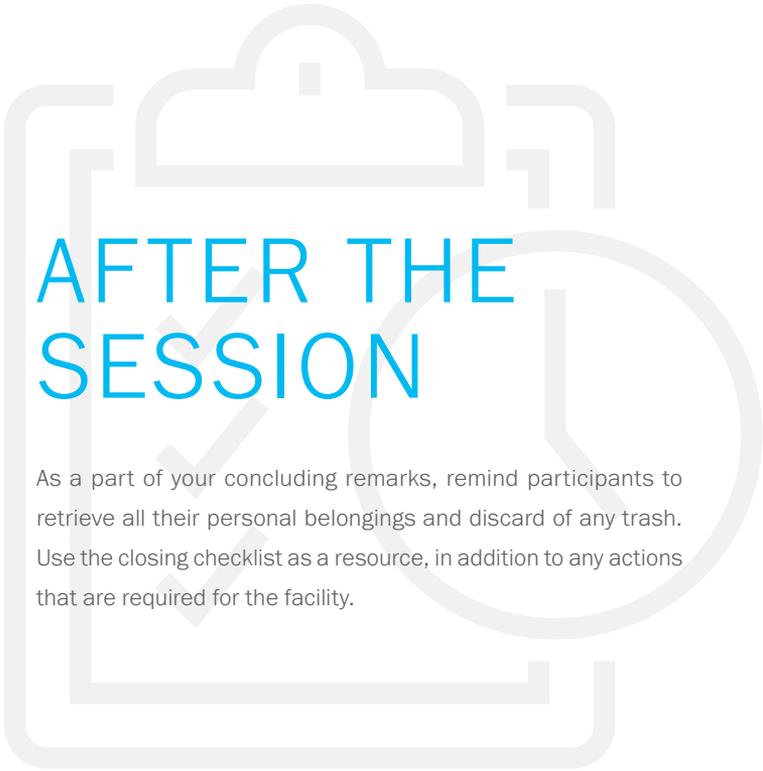
[Click on the image to download the Participant Guidelines PDF and distribute to your learners prior to training.](#)



## Facilitation Techniques

- Maintain physical distancing by facilitating “from the front” as opposed to walking around the perimeter of the room or standing next to or behind participants’ seats/tables.
- Be intentional about engaging participants by asking more questions, calling them by name and making eye contact.
- Provide frequent and extended breaks.
- Disinfect common surfaces and door handles after each break.
- Collect necessary materials after each activity and wipe them with disinfectant wipes
- Ask participants to clean their areas and discard trash frequently.

**TRAINER TIP:** To minimize touchpoints, establish expectations that you will be only person who distributes and collects materials.



# AFTER THE SESSION

As a part of your concluding remarks, remind participants to retrieve all their personal belongings and discard of any trash. Use the closing checklist as a resource, in addition to any actions that are required for the facility.

## Closing Checklist

### ROOM SETUP

- Collect any remaining program materials and clean them with disinfectant wipes.
- Discard any unwanted items and trash.
- Collect all your facilitation materials.
- Clean common areas according to training site and CDC guidelines. For more information about CDC cleaning recommendations, visit: [cdc.gov/coronavirus/2019-ncov/community/cleaning-disinfecting-decision-tool.html](https://www.cdc.gov/coronavirus/2019-ncov/community/cleaning-disinfecting-decision-tool.html).
- Document any additional to-dos:

## Organizational Guidelines

Use this space to document any guidelines that are specific to your organization and the training location.

### PHYSICAL DISTANCING REQUIREMENTS

### PPE REQUIREMENTS

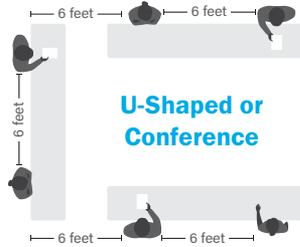
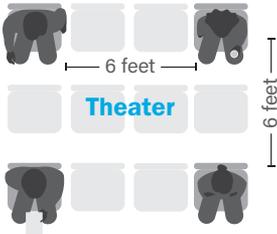
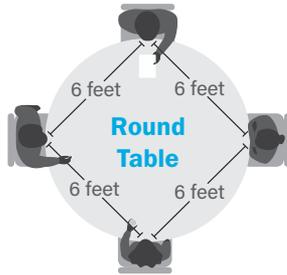
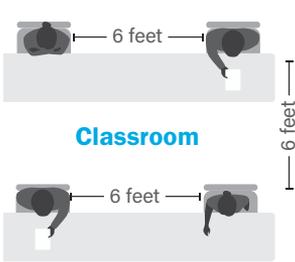
### COMPANY-SPECIFIC GUIDELINES AND RESOURCES

#### **Additional CDC Resources**

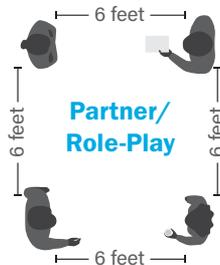
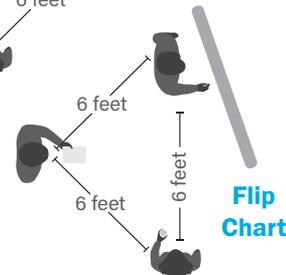
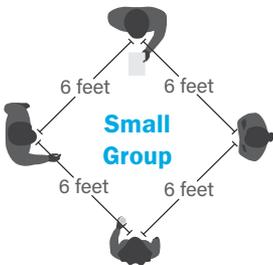
[cdc.gov/coronavirus/2019-ncov/prevent-getting-sick/prevention.html](https://www.cdc.gov/coronavirus/2019-ncov/prevent-getting-sick/prevention.html)

[cdc.gov/coronavirus/2019-ncov/community/organizations/businesses-employers.html](https://www.cdc.gov/coronavirus/2019-ncov/community/organizations/businesses-employers.html)

## Seating Layout Options



## Activity Layout Options



## WANT TO LEARN MORE?

To further improve your leadership skills while navigating the unique challenges organizations are facing today, please visit our website and download the *Remote Manager Handbook: How to Manage Others and Maintain Engagement* and the *Returning to Work Handbook: Reflection and Strategies for Employees*.

*Situational Leadership®: Building Leaders* provides leaders with an action-oriented framework that increases both the quantity and quality of performance conversations by matching an individual's Performance Readiness® for a specific task with the appropriate leadership style.

If you are interested in additional resources about how to use Situational Leadership® to lead more effectively and manage change, visit [situational.com](https://www.situational.com).