

**MG&A**

**Systematic Instruction**

**Certification**

**Handbook**

**2017**

## **Welcome!**

Welcome to the Systematic Instruction Certification Process!

Now that you have completed the 3-day Gateway training on Systematic Instruction and have decided to work toward certification, this handbook will describe the requirements for certification. The training you will receive, the mentor who will guide you through this process, and the resource materials you will be given, provide a wealth of information to support your quest for certification. This is a performance-based certification in that you will be performing the Systematic Instruction process while you learn.

For Systematic Instruction certification, the Coordinator is Pam Bossert of Austin, TX ([bossertpk@gmail.com](mailto:bossertpk@gmail.com)). Pam's background includes Special Education teacher, MG&A job trainer for employment projects for individuals with developmental or intellectual challenges at various corporations, Global Training and Development Manager at Motorola and MG&A Systematic Instruction training consultant.

You will be assigned a personal mentor by Pam after your registration form has been received and the registration period has ended. Your MG&A mentor will have 7 hours to mentor you through the certification process. Be sure to read & understand the information in each section of the handbook. If you have concerns or questions discuss them with your assigned mentor.

Successful employment for individuals with disabilities is the result of three comprehensive components Discovery, Job Development and Systematic Instruction. In Systematic Instruction certification, you will apply the Systematic Instruction skills and knowledge to facilitate training an individual with disabilities. This includes conducting job analysis, completing task analyses, training a learning partner in job tasks, taking data and using different training techniques. This will be done within the framework of the Seven Phase Sequence and balancing the needs of the learning partner and employer in order to achieve successful employment.

You must negotiate with your supervisors at work for the release time necessary to complete the activities that are required. You must communicate with your employers to assure that funding is available to support employment opportunities that may be developed as a result of this process. You will need approximately 40-45 hrs. over the 20-week period.

## Systematic Instruction Requirements

To be successful with certification, you will need to fulfill the following requirements to the satisfaction of the MG&A Mentor.

1. Learning Partner(s): Select an appropriate Learning Partner(s) to train on two (2) types of tasks using Systematic Instruction and one (1) task for the Seven Phase Job Analysis Sequence Simulation. You may have the same or different Learning Partner(s) for this training. You will be required to identify an individual(s) with a significant intellectual disability and who is supported by your agency or locale. He/she must be someone who is interested in working and being a Learning Partner with you. Ideally your Learning Partner will have completed MG&A Discovery Process; including a Profile, Customized Plan for Employment and Visual Resume and qualifies for funding through VR and/or DD services in their state. MG&A recommends that you have a “back-up” individual in case your initial individual decides not to participate. Please check with your Learning Partner(s) agency for any required releases of information forms so that information can be shared with your MG&A Mentor.

Discuss with your mentor your selected Learning Partner(s) and discuss the tasks to be trained, the interests of the learner and any constraints the learning partner may have.

**NOTE:** Stipend for Learning Partner(s) is not provided by MG&A. MG&A recommends compensating Learning Partners with stipends based on the prevailing minimum wage in your area for the time they work with you. The sponsoring organization/local agencies will determine if learning partners will receive stipends and if so the amount and process for payment and provide for payment.

2. *You will be required to complete the following forms:*
  - a) Systematic Instruction Signature Page –a form stating that you have read the handbook and agree with the requirements for certification.
  - b) Agreement to use MG&A Webinar Series - a form giving you permission to view the webinars. This form is emailed to MG&A (marcgoldassociates@gmail.com).

3. You will be required to watch the following webinars:
  1. SI History of Systematic Instruction - 1 hour 12 minutes
  2. SI The Seven-Phase Sequence - 37 minutes
  3. SI Method and Content – 29 minutes
  4. SI Types of Job Tasks and Job Analysis – 21 minutes
  5. SI Formats & When/How Much Information – 28 minutes
  6. SI Types of Instructional Assists/Where – 1 hour 3 minutes
  7. SI Teaching Episodic Tasks & Sequential Role Play – 1 hour 15 minutes
  8. SI Data Collection and Other Concepts – 1 hour 16 minutes
  9. SI Motivation vs. Reinforcement and Values - 1 hour 17 minutes

Discuss with your mentor the sequence and timing for the most effective learning and application with other certification activities. *NOTE – You may view the webinars while working on other certification learning activities.*

You are encouraged to watch the webinars with other SI certification participants and have group discussions to further your understanding of the material. Please ensure that anyone else viewing the webinars is currently working toward certification and has a signed webinar agreement on file. Take notes, discuss and ask questions with your mentor.

4. Communication with your mentor can be achieved by phone calls, emails and SKYPE. You and your mentor should discuss the best time and ways to communicate and share information. You should respond in a timely manner to emails or phone calls from your mentor unless other arrangements have been made. Participate in conference calls. These calls give you an opportunity to collaborate with other people pursuing certification in Systematic Instruction.
5. You will develop an Activity Log & Learning Plan and create a timeline to complete all requirements within 20 weeks. The Log/Plan will help you stay on track for successful completion. The Activity Log & Learning Plan can be found on the [Marc Gold & Associates website](#). Once you have created an individual Log/Plan with dates to complete certification activities, discuss and review it with your mentor. Use the Activity Log & Learning Plan to document key learning, time to complete and dates for each learning activity. You will submit this monthly to your mentor.

A final Activity Log & Learning Plan is submitted to your mentor when all certification requirements have been completed and successfully demonstrated to your mentor's approval. Please include dates learning activities are completed.

6. There are four (4) assigned articles, which are located on the MG&A website. The titles of the articles:

*Seven Phase Sequence for Balancing Natural and Individual Needs Article*

*Systematic Instruction Strategies for Organizing Information Article*

*Systematic Instruction Training and Motivation Article*

*Job Analysis: A Strategy for Assessing & Utilizing the Culture of Work Places to Support Persons with Disabilities Article*

You will be required to complete the following forms for Systematic Instruction, which are located on the [Marc Gold & Associates Website](#). These forms are:

*Task Analysis Data Form*

*Job Task Analysis Form*

Samples for each form are available to assist you:

*Sample Task Analysis for a Core Work Task*

*Sample Task Analysis Data Form*

*Job Task Analysis Sample*

Discuss with your mentor the sequence and timing for the most effective learning and application with other certification activities, *for reading and reviewing these articles and forms*

Take notes, discuss, and ask questions when you speak or email with you mentor.

7. Task Training: You are required to identify and train one (1) Core Task and one (1) of the Following Types of Tasks: Episodic, Job-Related, or Work-Related Task requiring Sequential Role Play Training Strategy. Identify and train the two types of tasks to criterion with learning partner(s), complete all required documentation and submit to mentor for approval.

You should view Webinar 4. SI Types of Tasks and Job Analysis before making the work tasks selection.

Identify and discuss with your mentor possible job tasks that represent each of the four Types of Tasks listed above (Core, Episodic, Job-Related, Work-Related using Sequential Role Play).

Depending on the tasks selected and training strategies you may complete the entire process from identifying method to criterion performance for one task at a time or if the core and episodic tasks are related as part of a job you may complete the process for a core and episodic task with the same learning partner at the same time. Discuss with your mentor to decide the best sequence.

## **Task Steps**

- Step 1 Identify Task for Core task training.  
Submit job task to mentor for review, discussion and approval.
- Step 2 Determine Method.  
Observe task being performed and determine the natural/typical method to perform the task.  
Learn the task yourself using the natural method.  
Make a Video of the natural method.  
Submit video of method to mentor for review, discussion and approval.  
When sending, video include your initials, Title, Method and Task Name to identify what is being submitted.
- Step 3 Conduct a Task Analysis.  
Analyze the method, identify and record the content action steps that represent the natural/typical method using the MG&A Task Analysis form.  
Submit written Task Analysis form to mentor for review, discussion and approval.
- Step 4 Transfer the content steps identified in Step 3 Task Analysis, to the MG&A blank Task Analysis Data form.  
Conduct initial training with learning partner and complete Task Analysis Data Collection form.  
Submit Task Analysis Data Form to mentor for review, discussion and approval.
- Step 5 Video your training with the learning partner doing the task during one of your beginning training sessions to record an early cycle of their learning the task. You will also record training data on your Task Analysis Data form completed in step #4.  
Document how Systematic Instruction training strategies, principles and techniques were applied to organize information and provide information and support to teaching the task.  
Submit video and documentation to mentor for review, discussion and approval.  
When sending video and documentation label with your initials, Title, Initial Training and Task Name to identify what is being submitted.

- Step 6 Continue training to mid-point learning/performance.  
Video your training with the learning partner after he/she has clearly learned some of the steps that will show a mid-point cycle of their learning.  
Continue to recording training data on your Task Analysis Data form.  
Document how Systematic Instruction training strategies, principles and techniques were applied to organize information and provide information and support to teaching the task. You will note any changes in approach from the initial training cycle.  
Submit video and documentation to mentor for review, discussion and approval.  
When sending video and documentation include your initials, Title, Mid-Point Training and Task Name to identify what is being submitted.
- Step 7 Train until Criterion is reached--a cycle of performance that reflects criterion performance by the learner with no assistance from you.  
Video your learning partner when she/he has met criterion performance.  
Continue to collect training data on your Task Analysis Data collection form until criterion performance has been reached.  
Document how Systematic Instruction training strategies, principles and techniques were applied to organize information and provide information and support to teaching the task. You will note any changes in approach from the mid-point learning cycle.  
Submit video, documentation to mentor to review, discussion and approval.  
When sending video and documentation include your initials, Title, Criterion Performance and Task Name  
NOTE When task is using Sequential Role Play the video is just before criterion performance.
- Step 8 Repeat the above for a second type of task; Episodic, Job-Related, or Work-Related Requiring Sequential Role Play.

MG&A has prepared step by step videos on how to set up your Dropbox, make a video, edit and upload your videos to a Dropbox.

Dropbox - [How to use Dropbox](#)

Recording and Editing Videos Part 1 [Video on Recording and Editing Videos Part 1](#)

Recording and Editing Videos Part 2 [Video on Recording and Editing Videos Part 2](#)

How to Upload Videos [Video on How to upload videos](#)

Systematic Instruction Task Training Documentation is required for each training activity listed below. Your mentor will review, discuss and approve that you have successfully applied Systematic Instruction. It is required to obtain mentor approval for each individual activity before proceeding to the next training activity. Remember you are required to document one core task and one other task to complete certification.

<b>SI Learning Activity &amp; Documentation</b>	<b>Core</b>	<b>2<sup>nd</sup> Task</b>
Video method (step 2)	X	X
Content Task Analysis (step 3)	X	X
Data Collection Form with content steps (step 4)	X	X
Initial Training – video, training data, training strategies & decisions (step 5)	X	X
Mid-point training – video, training data, training strategies & decisions (step 6)	X	X
Criterion training – video, training data, training strategies & decisions (step 7)	X	X

## Seven Phase Sequence

You are required to conduct a Seven-Phase Sequence 1<sup>st</sup> Day of Work Job Simulation. Find a local employer who will allow you to conduct a Job Analysis of the business with a specific work task. Simulate the first day of work using natural ways, natural means, methods and people to train your learning partner using the Seven Phase Sequence. Complete all required documentation, submit to your mentor for review, discussion and approval.

For this simulation, you will:

Identify a local employer willing to have you conduct a job analysis.

1. You may use a third party, such as a manager or agency job developer, to help you source and negotiate the employer's participation.
2. Review and discuss with your mentor the potential employer, how to complete a Job Analysis and what work task you are selecting; get approval to proceed.
3. Conduct a Job Analysis and complete the **Job Analysis form**.
4. Submit completed Job Analysis to mentor for review, discussion and approval prior to training.
5. Facilitate a simulated Seven Phase Sequence activity with your learning partner at the employer site.
6. The Job Simulation should reflect the 1st day of work training on a specific job task based on the Job Analysis, utilizing the Natural Ways, Natural Means, and Natural People of the company to train your learning partner. Your learning partner should perform the designated job tasks for a minimum of 30 minutes.
7. During simulation, you will video/take stills of the training, collect training data and write descriptive notes of the 30-minute activity.
8. Submit your video, training data and documentation of the actual Job Simulation to your mentor for review, discussion and approval.

## **Summary**

Ensure all required final documentation has been submitted and approved by your mentor. This includes the following:

Activity Log & Learning Plan with dates, total time & learning insights.

The Content Task Analysis, Training Data Collection Form showing criterion performance, videos showing learner criterion performance for core and another selected task. NOTE - these will not be used for any other purpose without appropriate consent and permission from participant and learning partner.

Job Analysis completed for company selected for Seven Phase Sequence

Content Task Analysis for task to be trained in Seven Phase Sequence simulation

Training Data Collection form or facilitator notes on how the Seven Phase Sequence was used in the simulation.

## **Responsibilities of the Person Seeking Certification**

It is your responsibility to read all documents, including this handbook and Systematic Instruction articles, respond to all emails, phone calls, and watch all webinars. You should participate in all conference calls set up by your mentor. Complete all required forms, documentation and task training with your learning partner. Make and submit all required videos to your mentor.

## **Timeline for Certification**

Please be aware that MG&A fully expects participants to complete the certification process within the 20-week timeline. MG&A does recognize that family/health issues do occur. MG&A has developed the following policies with regard to extending timelines for participants.

### **Delayed Start**

When a mentor has made the first contact with you, you are expected to already have identified a learning partner who, ideally, has been through the Discovery process. However, if you do not have a learning partner, we will give you a two-week window to locate a learning partner. After that, MG&A will place you on hold until you have a learning partner---it is then your responsibility to let MG&A know when you have a learning partner. When you do contact MG&A, MG&A will then determine whether to grant permission for you to move forward. In no case, will permission be granted to continue if you have been on hold for six months or longer. Depending on the original mentor's schedule and work load, you may or may not have the same original mentor.

### **Extension**

If it becomes apparent to the mentor that you will not meet the 20 weeks' deadline or if you are unable to meet the quality standards expected, the mentor will make a decision based on MG&A timeline extension policies.

1. Reasonable exceptions to the timeline are: medical emergencies, family emergencies, health issues and issues with learning partners (moving, etc.) When the participant experiences any of these situations, extensions can be given and no extension fee will be assessed. A new timeline will be established.
2. Supervisors at times will ask for extensions for participants because of unanticipated work load increases. We certainly recognize these unanticipated issues and will grant extensions based on these exceptions. However, the agency will be required to pay a \$75.00 extension fee per participant.

3. If you have been responsive during the process but have struggled and have begun to show a potential positive outcome and will need an extension to complete the process, an extension will be granted. However, you will be assessed a \$75.00 extension fee. If you have used all 7 hours of mentoring, additional mentoring hours will have to be purchased separately from the extension fee.
4. If you have not been responding to mentor emails and haven't been turning in work in a timely manner and then find you cannot finish within the 20 weeks, an extension will not be given to you.

### **Quality Performance**

Participating in the certification process does not guarantee you will earn a certificate. You must meet MG&A standards as determined by your mentor.

If you are still within the 20-week timeframe but have used the 7 hours of mentoring time provided in your fee and if the mentor believes you are making successful progress, you or your agency may be charged an additional mentoring fee of \$75/hour until you complete the process. MG&A monitors the mentoring time and will contact you and your agency should we see this become a possibility.

**The mentor will make these decisions based on MG&A's policy for extensions, your performance and your response to calls, emails, timelines and requested edits. The mentor will also include the Coordinator of Systematic Instruction Certification, as well as your employment supervisor in reaching these decisions.**

### Suggested Timeline

The following timeline for Systematic Instruction activities can be used in planning your activities, these times are estimates.

1. Phone calls, emails with mentor	7 hrs.
2. Watch all webinars and read all articles	10 hrs.
3. Task Identification, training preparation, training – 2 tasks	15 hrs.
4. Seven Phase Sequence Job Analysis & simulation	8 hrs.
5. Editing and uploading of videos	3 hrs.
6. Submission of all final documentation and uploading	2 hrs.
Total hours	45 hrs.

Please sign the last page of this handbook and send to your mentor to indicate your understanding of the requirements for this certification and your responsibilities in meeting these requirements.

**Systematic Instruction Signature Page**

Please Sign:

As an individual applying for certification in Systematic Instruction from Marc Gold & Associates, I have read and understand the requirements for certification and my responsibilities involved.

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Agency

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

# Appendix

## **TIPS FOR SUCCESSFUL COMPLETION OF CERTIFICATION**

**Start early:** Begin to identify a learning partner when you submit your registration form for certification. Your learning partner should be someone who has an interest in obtaining employment. If the learning partner is school-age, expect to meet with the building principal and the Director of Special Education to gain entrée into the schools. We suggest you do this early in the process as you might have to undergo a background check.

**Explain the Process:** Ensure that your learning partner and the family understand the process and will commit to the entire process. This assists in completion of certification in a timely manner and avoids delays in having to identify a new learning partner mid-process and having to start over.

**Pay attention to the webinars:** There is a lot of information in the webinars that is meant to help you understand and be prepared for the certification process.

**Write descriptively:** Avoid the use of evaluative and subjective words. Some words to avoid include: can, will, able, often, enjoys, likes, loves, etc. Writing descriptively can be challenging; however, your mentor will guide you through this process.

**MG&A Activity Log and Learning Plan:** Your Activity Log and Learning Plan is set up to outline all the tasks and activities that must be completed during the certification process. Please ensure that you are completing at least the minimum requirements in each section. Please complete your activity log as you go through the process. **Do not wait until the end to complete this document.**

**Block out time:** Upon beginning the certification process, it may seem like 20 weeks is a lot of time to complete all the requirements of certification. The allotted time for completion is sufficient, however, there will be other demands (work, life, etc.) that you experience while going through certification. If you don't specifically block out time to complete all your requirements, you will soon find that you have not completed certification within the timeframe and will run the risk of not becoming certified. Also, keep in mind that your learning partner is someone who has expressed an interest in obtaining employment. You want to remain aware of the fact that how you spend your time will have an impact on this person.

**Use your mentor for support:** If you are unsure how to proceed or how to record your data, contact your mentor to seek support.

**Photographs and Videos:** Videos and/or photos are required throughout the certification process. Please take time to ensure videos and photos represent your learning partner in a respectful manner.

**Self-learning:** You are assigned a mentor for this process who will help keep you on track. Your mentor will establish timelines and due dates for assignments. It is up to you to stay focused and make sure you complete your work on time. Adult learning can be challenging if you don't prepare yourself and remain organized. Your mentor isn't responsible for reminding you of deadlines and following up to ensure your work is completed. Most mentors, however will check in to see how you are doing.

**Quality:** It is important for MG&A to maintain the integrity of the certification process. Certification is based on a combination of completing all required tasks as well as meeting MG&A quality standards.

**Communication:** Respond to emails and participate in conference calls. You should always feel comfortable talking to your mentor about any issue impacting your progress, such as confusion over content, illness, etc. Mentors are there to support and guide you.