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HELPING LEARNING TEAMS STAY AHEAD

Instructional Design Support Portfolio

Portfolio Includes:

- Virtual Instructor-Led (VILT) Script
- Participant Workbook
- Performance Support Job Aid
- Developer-Ready eLearning Storyboard
- Instructor-Led Facilitator Guide



WEBSITE

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About Me



Hello, I'm Von. I'm an instructional designer with more than 20 years of experience creating learning solutions for a variety of industries.

I enjoy transforming complex information into practical, learner-ready materials that support instructors, engage learners, and improve performance.

Today, I support busy learning and development teams by creating the instructional materials they often don't have the time or bandwidth to develop. Whether refining existing content or building new learner assets, **I help teams move projects forward with polished, professional deliverables.**

My approach emphasizes clarity, practical application, learner engagement, and materials that instructors can confidently deliver.

Industries Served

Military | Healthcare | Financial Services
Utilities | Government

I believe the best learning materials remove barriers—not create them. Clear, well-designed instructional resources help instructors teach with confidence and learners succeed with purpose.

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HELPING LEARNING TEAMS STAY AHEAD

Virtual Instructor- Led (VILT) Script

PROJECT OVERVIEW

Virtual Instructor-Led (VILT) Script

Delivery type: Highly scripted Virtual Instructor-Led (VILT) facilitator guide

Industry: Financial Services

Audience: Customer Service Representatives

Project Role: Lead Instructional Designer

Responsibilities:

- Learning Outcomes
- Facilitator Guide Development
- VILT Support
- Adult Learning
- Instructor Scripting
- Virtual Facilitation
- Learner Engagement

Why this sample was selected: Demonstrates the creation of a detailed VILT facilitator script that supports consistent delivery, learner engagement, and instructor confidence in a virtual classroom environment.

Note: Company name and identifying details have been modified to protect client confidentiality.



SOLARA
CAPITAL & SAVINGS
— BUILDING TODAY. SECURING TOMORROWS. —



TRUST
Your future,
our priority.



GROWTH
Strong roots,
brighter tomorrow.



ENERGY
Empowering dreams,
fueling progress.

Posting and Balances (Virtual Instructor-Led Session)

Facilitator Guide

Instructor Preparation

Prior to delivering this session:

- *REVIEW* this facilitator guide.
- Review the PowerPoint in Slide Show view while reviewing the facilitator guide. Slide Show view will allow you to identify any animations within the slideshow.
- Familiarize yourself with WebEx; whiteboard, chat, green check, red x, and emoticons.
- Log on to WebEx at least 30 minutes early to set up your session. Log on instructions are included in the session invitation. **Remember to log on as the host.**
- Open the PowerPoint as a **document** and display the puzzle while waiting for the session to start. Share the markup tools with participants by going to the **Participant Menu>Assign Privileges>Marking Tools.**
- **Remove the Marking Tools** before you officially start the session.
- Consider **muting the conference line** until you take questions from the participants. It's recommended to choose a participant who raises their hand, and then opening the line for them to ask.

During the session:

- Please note the inflection of your voice and try to limit monotones, distracters such as “uh” and “ahh”, and dead space.
- Feel free to elaborate on any bullet points that begin with “Paraphrase.” The bullets are key points, but you are the facilitator and the participants will learn from you.
- Pay attention to the time. Timings are noted in the left-most column at the beginning of each topic.
- **Co-hosts are highly recommended.** Click on the co-host's name in the participant panel. One facilitator presents the material while the co-host manages the interactions, such as changing slides, opening chat, etc.

Chocolate Bars – Find and circle all the chocolate bars hidden in the grid using your drawing tools.

X I W T E H T U R Y B A B
S H D A I R Y M I L K U P
A E C H L S Y Y E I O M S
R E G N I F R E T T U B I
O R E A U N A M C Y C C R
M S K R E R O A O R A E C
I H N H A U C J E R B R E
L X H I N B D E A N M O E
K O R D C N S M L R G M F
Y O S O O K I R B T U T F
W Y C M K L E I A K S A O
A N L B K S G R T M C E C
Y A K I T K A T S E F B N

AERO
ALMOND JOY
BABY RUTH
BUTTERFINGER
CARAMILK
COFFEE CRISP
DAIRY MILK
EAT-MORE
KIT KAT
MARS BAR
MILKY WAY
MOUNDS
MR. BIG
NESTLE CRUNCH
OH HENRY!
SKOR
SNICKERS
TWIX

Activity	Content
Time: 0 minutes	This slide displays on screen as participants join the session. It serves two purposes: - Provides some engagement while participants wait for the session to start. - Allows participants to practice using the mark-up tools in WebEx. Welcome participants as they join the session and encourage them to find the words in the puzzle until the session officially begins.
Course Time: 0:00	

Posting and Balances



Activity	Content
Time: 5 minutes	Welcome and Introduction
Course Time: 0:05	PARAPHRASE: • Welcome to the Posting and Balances virtual session. • I hope that we will have a very enjoyable and informative discussion today and I thank each of you for taking time from your busy schedules to attend. ASK: • Did everyone get a chance to find a chocolate bar? Please indicate “yes” with a green check or a red X for “no”. • If you would love to be nibbling on one of those right now, please raise your hand. • Select the emoticon that best describes how you feel about chocolate. PARAPHRASE: • You will use the green check, red X, the raised hand, and emoticons during this session, so it is important to remain attentive to the information being presented today. • Feel free to use the emoticons during the discussion.

Briefly **introduce** yourself to the participants. (You might include your title, what you do, length of service, and where you are located.)

PARAPHRASE:

- There has been a lot of work and training done over the past year to prepare for Wave 1 conversion and we survived!
- You have been instrumental in assisting all of our customers during this time and continue to live up to the Solara Capital & Savings brand.

ASK:

- Using your **emoticons**, how comfortable are you with handling posting and balances inquiries from your customers?

READ LEARNING OUTCOMES VERBATIM:

- During today's session we will talk about what you've learned in previous training about posting and balances, and about things that may have changed or been discovered through customer interactions.
- At the end of the session, you will be even more familiar with the posting process and better equipped to assist your customers with questions about their accounts.

PARAPHRASE:

- Today we'll briefly discuss Funds Availability, talk a bit about Posting and Balances, and then about Refunds.
- During the session, **we'll pause for your questions** as we wrap up each topic. Jot them down so you can remember them. During the Q&A, we'll ask you a few questions about things you've seen at your branches or to clarify things we've discussed today.
- Let's get started and talk about Funds Availability.

Funds Availability

Funds Availability – Customer #1

Jessica Angler has \$14.00 in her account.

At a Solara branch, she deposits a \$1,500.00 check from Dollar Bank on June 8, 2026 at 2:15 p.m. ET.

Check #154	\$105.00
Check #144	\$90.00
POS	\$88.46
POS	\$67.46
POS	\$64.23
POS	\$5.23
Total	\$420.38

Activity	Content
Time: 15 minutes	SAY: Jessica Angler has \$14 in her account. At a Solara Capital & Savings branch, she deposits a \$1,500 check from Dollar Bank on June 8, 2026, at 2:15 pm EST.
Course Time: 0:20	ASK: - How much of this deposit is Ms. Angler able to immediately withdraw? Use chat to type in your answer. ANSWER: \$14 - Is she able to withdraw any of the \$1,500? Use the green check for “yes” or red X for no”. ANSWER: No, she isn’t because of the next day availability for non-Solara Capital & Savings checks. - What is Ms. Angler’s Balance Available to Pay Items (without incurring a fee) during nightly processing? Use chat to type your answer. ANSWER: \$114

Q & A

Q & A



Activity	Content
Time: 13 minutes Course Time: 0:60	PARAPHRASE: • Now it's time for me to pause and answer some of your questions. • If you have a question about something we've discussed today or an issue you've seen in your branch, use the emoticon to raise your hand. • Open the conference line for questions. Summary PARAPHRASE: • We've had a very interesting session today. • We discussed Funds Availability, walked through some customer examples on Posting and Balances, and talked about the new Refund Decision Tool. ASK: • Using the emoticons, how comfortable are you applying what you've learned here today? • I see that most of you are comfortable with the information you've learned today and are ready to assist your customers with ease and confidence! • Thank you for being an attentive group. This concludes the session.

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HELPING LEARNING TEAMS STAY AHEAD

Participant Workbook

PROJECT OVERVIEW

Participant Workbook

Delivery type: Scenario-Based Participant Workbook

Industry: Utilities

Audience: Gas Service Technicians

Project Role: Senior Instructional Designer

Responsibilities:

- Participant Workbook Development
- Scenario-Based Learning
- Learner Engagement
- Active Learning

Why this sample was selected: Demonstrates the development of an interactive participant workbook that reinforces classroom and field instruction through realistic scenarios, guided reflection, and active learner participation.

Note: Company name and identifying details have been modified to protect client confidentiality.



Customer & Excavator Communications

Participant Workbook



Introduction

Welcome!

When you perform locates, you will be interacting with customers and excavators on a regular basis. This interactive online workbook is intended to help you prepare for communicating with customers and excavators in different scenarios. Keep in mind that this workbook is not scored. Its purpose is to keep you thinking and to prepare you for your role as an independent Locator.

Follow these instructions to complete the workbook:

1. Read the material presented in the workbook. Use the Bookmarks on the left side of the window to navigate, as needed.
2. Type your answers in the space provided.
3. We will have a group discussion about your answers.

Communicating with Customers and Excavators

Scenario 1



Mrs. Brown is a popular, elderly resident known for her neighborhood vegetable garden. She has been watering her garden with a water hose by hand every morning for the past 35 years. Her husband finally convinces her to install an irrigation system that will not only save time and money but will help the environment by saving water.

Mr. Brown contacts a contractor who will install the irrigation system. Drip-Drop LLC. comes out and quotes Mr. Brown a price and informs him to call 811 so that underground pipelines in the area can be located and marked before the installation. He places the call, indicating the area that should be marked, and a ticket is created in the excavator's name.

You arrive at Mr. Brown's home and proceed to mark the area indicated on the ticket when Mr. Brown approaches you.

Question: Describe how you would introduce yourself to Mr. Brown.

Click or tap here to enter text.



Scenario 2



Mary is checking on her infant son who is asleep in his crib when she sees you lurking around her front yard. You are locating and marking gas lines in the area because the sewer company is replacing some of their lines. The sewer company did not inform the area residents of the activities. Mary is panicked and confronts you in a rage, yelling obscenities and asking why you there.

Question: How do you respond to Mary?

Click or tap here to enter text.

Conclusion

Next Steps

Now that you have the knowledge to communicate effectively with customers and excavators, you will continue to expand on your knowledge through your learning and field activities.

Here are your next steps:

- While in the field, observe how your mentor interacts with customers and excavators.
- Practice effective communication skills while interacting with customers and excavators you encounter during you locate jobs.
- Ask your mentor, OJT coach, or FOL for additional communication tips if needed.

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HELPING LEARNING TEAMS STAY AHEAD

Performance Support Job Aid

PROJECT OVERVIEW

Job Aid

Delivery type: Performance Support Job Aid

Industry: Health Care

Audience: All hospital employees

Project Role: Lead Instructional Designer

Responsibilities:

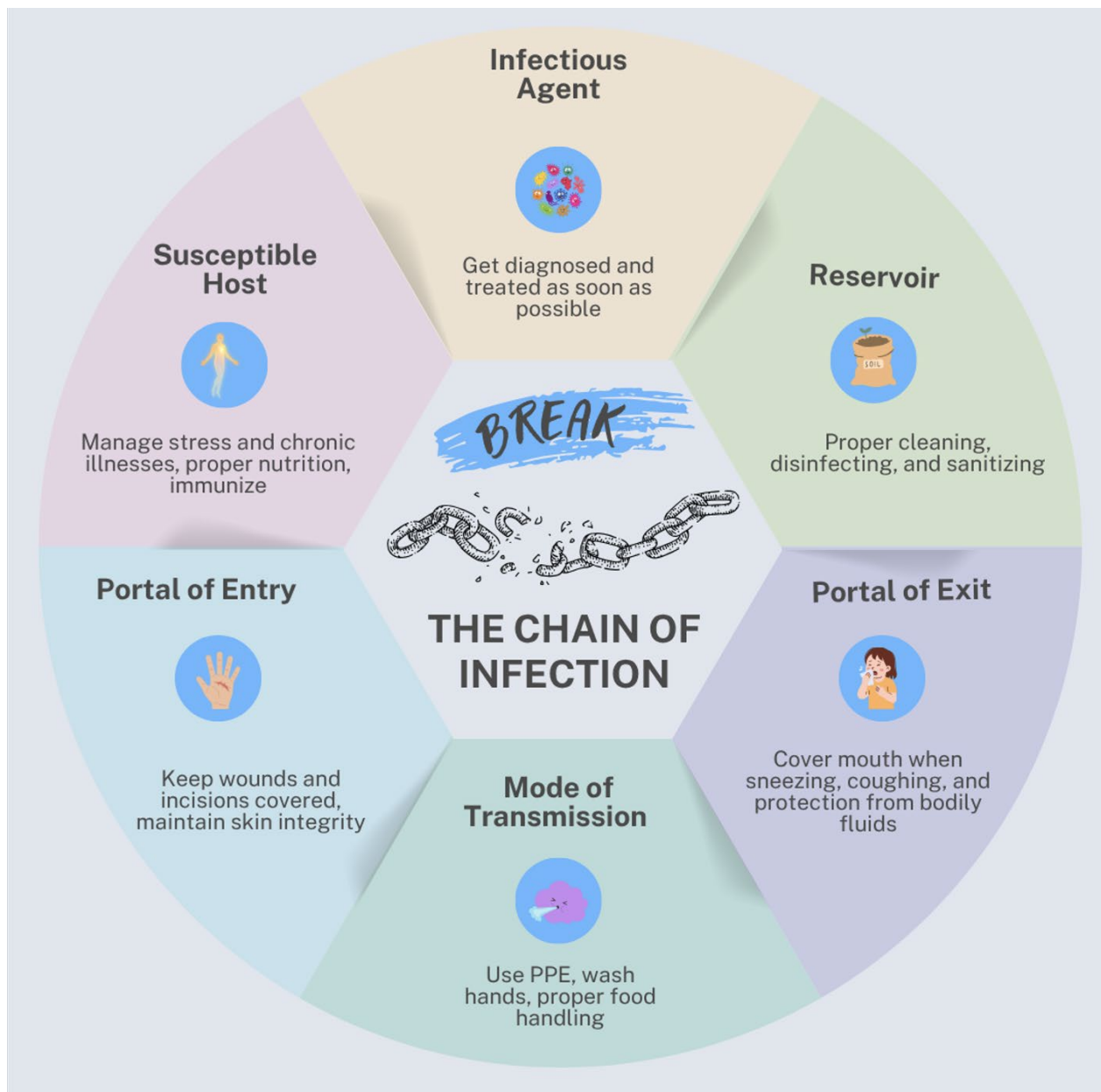
- Performance Support Design
- Job Aid Development
- Visual Information Design
- Adult Learning Principles

This sample demonstrates: The development of a visual performance support tool that simplifies a critical healthcare concept into a quick-reference resource for just-in-time application.

Note: Company name and identifying details have been modified to protect client confidentiality.



Use this quick-reference job aid to help break the chain of infection and protect patients, staff, and yourself.



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HELPING LEARNING TEAMS STAY AHEAD

Storyboard

Storyboard

Delivery type: Developer-Ready eLearning Storyboard

PROJECT OVERVIEW

Industry: Financial Services

Audience: Branch Customer Service Representatives

Project Role: Lead Instructional Designer

Responsibilities:

- Storyboard Design
- Interaction Design
- Developer Specifications
- Adult Learning Principles

This sample demonstrates: The development of a developer-ready eLearning storyboard that communicates screen layouts, learner interactions, programming requirements, and instructional flow for efficient course development.

Note: Company name and identifying details have been modified to protect client confidentiality.

Module Title

Security

**Storyboard: Security
Module Intro & Lesson 1****Designer**

Yvonne Williams

Module Break down:

This module includes 2 Lectora chapters (includes Module Introduction, all lessons, module summary, and assessment). The overall chapters/lessons are listed below, with the lessons included in this storyboard indicated in ***bold italic*** font:

- ***Branch Security***
- Robbery Procedures
- Summary {Module}
- Assessment

Bread Crumbs for this lesson storyboard

Security > Introduction

Security > **Branch Security**

Security > **Summary**

Programming Notes

- All screen titles are in black, bold font.
- All black, underlined text in the Text column will need a rollover with the definition/explanation of the term. The rollover has a silver background, blue frame and black text. The definition/explanation of the term is included in the Notes to Programmer column.
- All blue, underlined text in the Text column indicates a link
- A pop-up box is a separate window that can be moved and will be indicated in the Notes to Programmer column when used.
- Full-size images of the thumbnails in the storyboard will be available. The title of the file is listed under the thumbnail of the graphic.

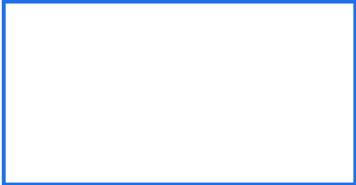
Security > Introduction

Screen 1

Text	Graphic	Action to advance screen	Notes to Programmer
Welcome As a CSR, you've assumed responsibility for numerous customer transactions and for a great deal of cash. As someone who is responsible for large amounts of cash, you are at risk for robbery. Because Sentinel Shield Bank cares about you, we want to prepare you for potential robberies and help you develop skills that will get you through a robbery calmly and safely. Understanding and following Sentinel Shield Bank's robbery procedures protects you, your customers, and your branch team members. In addition, the robbery and security procedures protect the bank from losses and promote customer and stockholder confidence. Furthermore, following these procedures helps you during Branch Audits, when several security-related tasks and	 mentor graphic 1.png	Next	Image to the right of the text Alt text: Businesswoman posing in front of a large window holding a laptop.

responsibilities will be assessed and rated. Hello. I'm Mary and I'll be your mentor throughout this module. I'll point out important steps or possible caution areas so that you can quickly grasp the concepts. Let's get started. At the end of this module, you will know: • Sentinel Shield Bank's corporate-wide robbery procedures • How to minimize the risk of injury to customers and employees. • What is expected of you in a robbery situation. • What you can do to help apprehend the suspect(s). Click Next to continue.			
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Security > Introduction
Screen 2

Text	Graphic	Action to advance screen	Notes to Programmer
The Module Structure This module has two lessons, and it will take you approximately 40 minutes to complete. At the end of the module, there will be an assessment to determine how much you've learned. Click each lesson title to see more information on what is in that lesson. Branch Security Robbery Procedures Click Next to learn more about the Multitran function.	 Pop up information appears in Text Box with Cipher Blue border (#1F6FEB; R-31, G-111, B-235)	Next	Please keep the Next button grayed out until the user views both Lessons and display a tracking green check, ✓ once a lesson has been clicked. Pop-up Information: Branch Security introduces you to branch opening procedures, cash issues, description techniques, and branch security equipment. Robbery Procedures focuses on how you can prevent and discourage branch robberies and prepare yourself for potential robberies. We'll discuss behaviors that will guide you safely through a robbery situation, as well as help you assist law enforcement in their investigation after a robbery.

Security> Branch Security

Screen 1

Text	Graphic	Action to advance screen	Notes to Programmer
Introduction Welcome to the Branch Security lesson of the Security module! This lesson focuses on common knowledge and behaviors that you will use throughout your branch experience. This lesson teaches you about branch opening procedures, cash issues, description techniques, and branch security equipment. We'll refer to these as "building blocks" throughout the module. Lesson Objectives At the end of this lesson, you will be able to: • Explain how daily branch-opening procedures discourage robberies and protect employees and customers. • Explain how following correct cash-handling procedures controls the branch's exposure to robbery. • Explain description techniques to use during and after robberies. • Describe the different types of security equipment that are commonly used in branches before, during, and after robberies to notify Protection Services, to notify local law enforcement, and to assist in the apprehension and prosecution of robbers.	 objectives slide.png	Next	Image to the right of the text.

Text	Graphic	Action to advance screen	Notes to Programmer
• Explain description techniques to use during and after robberies. • Describe the different types of security equipment that are commonly used in branches before, during, and after robberies to notify Protection Services, to notify local law enforcement, and to assist in the apprehension and prosecution of robbers. Click Next to continue.			

Security> Branch Security

Screen 13

Text	Graphic	Action to advance screen	Notes to Programmer
Description Techniques Now that we've covered branch-opening procedures and cash issues, let's focus on another "building block" that you will use on a regular basis throughout your branch experience: description techniques. In the unlikely event that your branch is robbed, one of the most difficult tasks you will be asked to perform afterwards is to describe the robber(s), the weapon(s), the getaway vehicle, the direction of travel, and the events that took place. Under normal circumstances, it can be difficult to describe people. Under the stress of a robbery situation – when you are nervous, tense, and scared – this task becomes even more difficult. Click Next to continue.	 blocks.png	Next	Image to the right of text. Alt text: Stacked building blocks labeled Description Techniques at the bottom, Cash Control in the middle, and Opening Procedures at the top.

Security> Branch Security
Screen 14

Text	Graphic	Action to advance screen	Notes to Programmer
Description Techniques As with any skills, practice makes perfect. So, how can you practice your description techniques given that robberies occur infrequently? Start by thinking about what you need to observe. What human characteristics could you use to practice describing people who you meet every day, such as the customers that come to your desk or workstation? <u>Click anywhere on the picture for suggestions.</u> Click Next to continue.	 collage.png	Next	Image to the right of text. When user clicks the picture, display the following: • Height: Compare height to a fixed object in the office such as: ○ Height markers inside the main door ○ Check counter ○ CSR counter ○ Signs ○ Handle/bar on the main door ○ Light switched near the main door • Weight: When describing someone's weight, compare their weight and build to someone you know, to someone in the branch, or to a well-known person. Alt text: Collage of random people of varying ages, sexes, and ethnicities.

Security> Branch Security
Screen 17

Text	Graphic	Action to advance screen	Notes to Programmer
Description Techniques Let's practice describing a potential robber. An image will appear for approximately five seconds, after which it will disappear. After the image disappears, click the checkboxes to indicate what you remember about the robber. Click Done when you are finished Click here to view the robber.	 robber.png	see Notes to Programmer	When user clicks the blue underlined text, display graphic to the right of text for 5 seconds. After 5 seconds, display the next slide. Alt text: Bank robber

Security> Branch Security
Screen 18

Text	Graphic	Action to advance screen	Notes to Programmer
Description Techniques What characteristics did the robber have? Click the appropriate checkboxes. Click Done when you are finished. ☐ a. Ski mask ☐ b. Hooded sweatshirt ☐ c. Running shoes ☐ d. Sweatpants ☐ e. Jeans ☐ f. Knife ☐ g. Work boots ☐ h. Over 200 pounds ☐ i. Necklace ☐ j. Fair skin		OK from answer feedback box	Include a Done button to reveal answer feedback. Multiple Choice, Multi-Answer Correct Answer Feedback: Correct! Incorrect Answer Feedback: Sorry, that's not correct. The correct answers are a, b, c, d, i, and j. The robber had a ski mask, hooded sweatshirt, running shoes, sweatpants, necklace, and fair skin.

Security > Branch Security
Screen 27

Text	Graphic	Action to advance screen	Notes to Programmer
Knowledge Check During what time of day is the branch vulnerable to a robbery? Check the appropriate button, and then click Submit. ☐ a. Before the branch opens ☐ b. During business hours ☐ c. When the branch closes ☐ d. All of the above		OK in the answer feedback box.	Add a Submit button at the bottom of answer selections to this and all subsequent knowledge checks. Correct Answer Feedback: Correct! Incorrect Answer Feedback: Not quite. The correct answer is D. The branch is vulnerable to a robbery at any time.

Security> Summary
Screen 32

Text	Graphic	Action to advance screen	Notes to Programmer
Branch Security Summary In this lesson you learned about proper branch opening procedures, cash procedures, description techniques, and branch security equipment. The information you obtained in this lesson is relevant to your daily branch tasks and responsibilities, and it will be useful to you in any situation – whether it's a normal business day or a day during which your branch is robbed. We'll refer to these “building blocks” again, so remember what you have learned! You have completed the Branch Security lesson! Click Next to continue.	 mentor graphic 2.png	Next	Next advances to the next lesson Alt text: Businesswoman posing in front of a large window holding a laptop.

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HELPING LEARNING TEAMS STAY AHEAD

Facilitator Guide

PROJECT OVERVIEW

Facilitator Guide

Delivery type: Instructor-Led Facilitator Guide

Industry: Utilities

Audience: Gas Service Technicians

Project Role: Lead Instructional Designer

Responsibilities:

- Facilitator Guide Design
- Instructor-Led Facilitation Support
- Learner-Centered Learning Development
- Active Learning Development

This sample demonstrates: The development of a facilitator-ready guide that supports consistent delivery through structured instructor guidance, active learning, and hands-on practice.

Note: Company name and identifying details have been modified to protect client confidentiality.



SUMMITSTAR
— GASWORKS —



Excavation and Safety Methods

Facilitator Guide



Module 5: Excavation and Safety Methods

Instructor Preparation

Overview

This module is divided into two lessons.

Lesson 1: Excavation Safety, including OSHA's 9 duties of a competent person, excavation safety methods, and protective systems.

Lesson 2: Field practice:

- Hand-dig an excavation to expose utilities
- Assemble and install shoring Needy Shore and InForm
- Install a modular shielding system

Trainees will be taking the Excavation Competent Person test later this week.

MDT Job Order

The Hand Dig Station of Field Practice has a Job Order for trainees to review.

Job Order 2313 (Maintenance to Service)

A scheduler sent a 2313 (Maintenance to Service) job type scheduled for the crew. Review the Work Summary panel to see the details of the job required. (The job requires replacing a curb valve that is leaking.)

- Set-up all trainees in the training environment
 - Ensure appropriate job order is available
 - Drop job order on each student
-

Key Safety Themes

Reinforce these key safety themes throughout this module:

- Work within a safe distance of a backhoe.
- Inspect the equipment and tools prior to work.
- Locate utilities prior to excavating.
- This Excavation Competent Person test prepares trainees to work in the field with other crew members, not on their own.



Module Objectives

Upon successful completion of this module, trainees will be able to:

- Describe excavation and safety methods, including:
 - OSHA's 9 duties of a competent person, job safety, protective systems, causes of trenching hazards, and safety requirements.
- Demonstrate the proper use of excavation tools and excavation methods to:
 - Hand-dig and backfill
 - Assemble and install a shoring system (Needy Shore and InForm)
 - Install a shielding system



Instructor Preparation, Continued

Materials

The following materials are required to complete this module:

Slides:

- Mod 5: Excavation and Safety Methods

Videos:

- OSHA Excavation Safety Video
- Trenching and Excavation and Safety Segment
- Colorado Springs Utilities

USB flash drive (for trainees)

- Trainees' Excavation Safety PowerPoint slide deck
- Trainee Activity Guide and Trainee MDTs

Gas Standards:

- GS 3000.020 – Inspection of Materials
- GS 3010.040 – Protection from Hazards
- GS 3010.050 – Installation of Pipe in a Ditch
- GS 3010.060 – Installation of Plastic Pipe
- GS 3010.080 – Transmission Lines and Distribution Mains Underground Clearance
- GS 3010.090 - Cover
- GS 3020.010 – Service Line Installation
- HSE 4100.040 – Excavation (Trenching) Safety

Posters:

- OSHA's 9 Duties of a Competent Person
- 5-4-3-2-1 Excavation and Safety
- AOCs, HSE Considerations

4 Field Practice Stations.

- Station 1: Hand-dig an excavation to expose utilities
- Station 2: Assemble and install a Speedy shoring system
- Station 3: Assemble and install a WinForm shoring system
- Station 4: Install a shielding system
- Instructor PPE and Trainee PPE



Timing

The following table outlines the activities and timing for this module.

Topic	Activity	Time
Introduce Excavation and Safety Methods	Slide Deck	10 mins
Lesson 1: Describe Excavation Safety Methods		
Introduce Lesson 1 Safety Methods	Instructor	5 mins
Research Excavation Safety	Teams	1 hour
Review Excavation Safety	LGD	45 mins
Review AOCs, HSE Considerations and Gas Standards	LGD	10 mins
Recognize AOCs	Individual	20 mins
Apply Excavation Safety Information	Teams	25 mins
Total Time: Lesson 1		3 hrs.
Lesson 2: Excavation Methods – Field Activities		
Introduce Excavation Field Practice	Instructor	5 mins
Field Practice: Station 1: Hand-dig Station 2: Assemble/install Need Shore Station 3: Assemble/install InForm Station 4: Install a shielding system	Coaches	4 hours
Debrief Hands-On Practice	LGD	10 mins
Total Time: Lesson 2		4 hrs. 15 mins
Knowledge Check	Assessment	15 mins
Module Review	Mini-White Board	20 mins
Summary	Instructor	15 mins
Total Time:		7 hrs. 45 mins

Continued on next page



Introduce Excavation and Safety Methods

Timing

10 minutes

Materials

- **Slide Deck:** Introduction
- **Posters:**
 - Module Objectives
 - OSHA's 9 Duties of a Competent Person
 - 5-4-3-2-1 Excavation and Safety

Overview

Explain:

This module is divided into two lessons.

Lesson 1: Excavation Safety, including OSHA's 9 duties of a competent person, excavation safety methods, and protective systems.

Lesson 2: Field practice:

- Hand-dig an excavation to expose utilities.
- Assemble and install Needy Shore and InForm shoring system
- Install a modular shielding system.

You'll be taking the Excavation Competent Person test at a later time this week or next.

You need a passing grade of 80%. So pay attention.

You spent some time discussing excavation in your New Hire training.

Ask:

What can you recall about excavation safety from your New Hire Training?

5-4-3-2-1, trenching, shoring, safety while working in a ditch, using the correct methods to protect against an accident

Continued on next page



Introduce Excavation and Safety Methods, Continued

5-4-3-2-1 Poster

Do:

Point to the 5-4-3-2-1 Poster and reveal each of the 5-4-3-2-1 points one at a time.

Reinforce any item that was incorrectly answered.

Ask:

What does OSHA stand for and what is their role?

Occupational Safety and Health Administration, a Federal Agency part of the United States Department of Labor. Their duty is to enforce safety and health legislation.

We'll spend an equal amount of time learning about excavation safety and practicing excavation.

Module Objectives

Do:

Go to the Module Objectives poster, and review it.

Explain:

- Describe excavation and safety methods, including:
 - OSHA's 9 duties of a competent person, job safety, protective systems, causes of trenching hazards and safety requirements.
 - Demonstrate the proper use of excavation tools and excavation methods to:
 - Hand-dig a trench to expose utilities.
 - Install a modular shielding system.
 - Assemble and install 2 different shoring systems.
-

Continued on next page



Lesson 1: Excavation Safety

Activity: Research Excavation Safety

Instructor Prep

Goal	To describe excavation safety
Grouping	Teams
Time	1 hour
Materials	• Trainee MDTs, Trainee Activity Guide • 1 USB drive per team with Excavation Slide Deck and Excavation Videos

Research Excavation Safety

Explain:

You'll be working in your teams for this activity and conducting research with information on a USB drive I will give each group. You will find information regarding 4 topics:

- 1) Causes of Trenching Failures
- 2) OSHA's 9 Duties of a Competent Person
- 3) Trenching Protective Systems
- 4) Safety Requirements

On the USB drive are some videos and a PowerPoint presentation. Your group will review all the slides and answer the questions in your Trainee Activity Guide.

Turn in your Activity Guide, Module 5: Researching Excavation Safety. There are 4 pages of questions. Complete them all.

Take your time. This information is important. It could be the matter of life or death to you or a crew member.

Do not split up this task. Complete these questions with your entire team.

- **What questions do you have before we get started?**

Continued on next page



Activity: Research Excavation Safety, Continued

USB Drive

Play Videos: Option A or B:

Option A-Play videos for large group. Encourage note taking.

Option B-Teams watch the videos in their groups and take notes.

Do:

Give USB drive to each group.

Say:

You have 60 minutes for your research and to complete the questions in your guide.

Do:

Visit each group to be sure they are on track.

At 45 minutes check on each group's progress.

Give the 2-minute warning. Call time.

Debrief

Do:

Divide the questions evenly amongst each team.

For example:

Assign Team 1 questions 1-7, Team 2 questions 8-11, Team 3 questions 12-18, Team 4 questions 19-22.

Have each team read their question and provide the answer.

Ask if the other trainees agree with the answer. Discuss any inconsistencies.

Next Safety Review Slides

Since this is such a critical component of your everyday work, let's take some time to review each of these topics to be sure we are clear.



Activity: Apply Excavation Safety Information

Instructor Preparation

Goal	To apply excavation safety knowledge
Grouping	Teams followed by a large group discussion
Time	30 minutes
Materials	• Slides: Applying Excavation Safety • Trainee Activity Guide, blank flipchart and markers

Activity

Explain:

There are 6 excavation scenarios located in your Trainee Activity Guide, Module 5: Applying Excavation Safety.

Work with your team, review each scenario, and complete the questions.

You have 15 minutes to complete all 6 scenarios.

Give them a 1-minute warning. Call time.

Do:

Prepare slide deck to display scenarios and answers.

Debrief

Say:

Let's discuss each of these scenarios. Let's start with Scenario #1 identifying risks of the excavation.

Do:

Ask a volunteer to read Scenario #1.

Ask:

Who would like to share one of the risks identified? Who else would like to share?

Do:

Record all risks on a flipchart.

Draw out more answers until all risks have been identified and recorded on the flipchart.

Continued on next page



Activity: Module Review

Instructor Preparation

Goal	To have fun while recapping excavation safety information
Grouping	Starting teams
Time	15 minutes
Materials	Mini whiteboards, 1 dry erase marker and eraser per group, 10 review questions, 1-minute timer. <i>Note: Hide any posters revealing answers to the questions.</i>

Fun Review

Explain:

This takes us to the end of the excavation module. Let's finish up with a team review and earn some money for your team.

Do:

Walk over and point to the Team Name flipchart we created on Day 1.

Say:

Get into your teams for a little friendly Excavation Safety competition. Each team needs a mini white-board, whiteboard marker, and eraser. Come get one.

Here is how this competition works.

We have 10 questions and a bonus question. Each question is worth \$20 for the correct answer. I will ask the question and your team has a minute to write your answer on the white-board.

You receive \$20 for a correct answer. In addition, I will take \$20 from you for an incorrect answer.

For the bonus question at the end, you can bet up to as much money as you have.

Is everyone ready for Excavation Safety?

Get your white-boards and markers ready. Get out your money in case you have to give some up!

Continued on next page



Activity: Module Review, Continued

Questions and Answers

Do:

Ask each question, and then start the 1-minute timer.

1. **Trench failure is not an accident; it is a _____ (certainty).**
2. True or False: Weather and time are two causes of trenching hazards? True

This is a 2-part question, and you must answer both parts correctly to get the money.

3. Safe egress is needed from a trench excavation when the trench is deeper than 4 feet and with a maximum lateral travel of 25 feet.
4. Identify 3 acceptable forms of egress? ladder, ramp, stairway
5. Spoil, equipment, and tools must be at least 2 feet from the edge of the excavation?
6. Identify 3 types of protective systems for type C soil? sloping, shoring, shielding
7. Ladders must be secured and extend at least 3 feet above the edge of the excavation.
8. How much does soil weigh per cubic foot? 120 lbs. per cubic foot

This is a 2-part question, and you must answer both parts correctly to get the money.

9. **How does shoring provide safety in a trench excavation?**
prevents the movement of soil (trench failure), is used when sloping to the maximum allowable slope is impractical

Question 10 has a few possible answers. Only 1 correct answer is necessary to get the money.

10. **When are protective systems required for an excavation?**
trench is greater than 5' deep, or if less than 5' – unstable soil, saturated/ standing water, vibrations from equipment, any condition deemed unsafe for the excavation

Bonus question is on the next page.



Module Summary

Review Module Objectives

Do:

Stand by the module objectives poster.

Have we accomplished all these objectives?

- Describe excavation and safety methods, including:
 - OSHA's 9 duties of a competent person, job safety, protective systems, causes of trenching hazards, and safety requirements.
- Demonstrate the proper use of excavation tools and excavation methods for:
 - Hand-digging a trench to expose utilities.
 - Assembling and installing a shielding system.
 - Installing a shoring system.

What is your comfort level?

Although we have completed these tasks, be aware that you will not be performing these tasks on your own, once you get to the field.

You will have a crew leader or supervisor working with you.

In order to perform these tasks on your own, you first must complete your Operator Qualifications for all these tasks.

Remember you will be working in the field and with your OJT coaches.

Close

Thank you everyone for your hard work and participation.

That concludes our module on Excavation Methods and Safety.

As we work through our other modules, think of how excavation safety plays a role in your work.

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