

# MG&A

# Systematic Instruction

# Certification

# Handbook

# 2022



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# MG&A SI Certification Handbook

## Welcome!

Welcome to the Systematic Instruction (SI) Certification!

Now that you have completed the 3-day Gateway Training on Systematic Instruction (SI) and have decided to work toward MG&A SI Certification, this handbook will describe the requirements and policies for certification. There are multiple resources and information available to you to successfully complete this process, including the SI Syllabus, archived webinars, the *Systematic Instruction and Job Site Supports* manual, and very importantly, you will have an SI Mentor to guide you. However, the most fundamental element is you! This cannot be done without your active engagement, and personal commitment to acquire the knowledge and learn the skills. You will also need to commit yourself to complete your work to the level of the performance standard required within the 20-week timeframe. This is a performance-based certification – and therefore you must effectively apply the SI process and demonstrate an understanding of SI strategies, techniques and principles while you are completing certification. MG&A SI Certification is about developing and acquiring SI competencies.

The coordinator for MG&A SI Certification is Marion Curry of Tifton, GA ([marion.curry@gmail.com](mailto:marion.curry@gmail.com)). Marion's background with SI is extensive and includes the use of SI in employment and for everyday tasks, working in this area since the '70's. Marion has been a consultant with MG&A throughout this time while also being the director of local programs. Her experience also includes systems change facilitation, both at the program and community level.

As noted above, an exciting and central aspect of the MG&A SI Certification process is that you will be assigned a personal MG&A Mentor after your registration form has been received and processed. Your MG&A Mentor will have 9 hours to mentor you through the certification process. Be sure to read and understand the information in each section of this handbook. If you have any questions or need clarification about the process you can discuss this with your assigned Mentor.

Successful employment for individuals with disabilities is the result of three comprehensive components: Discovery, Job Development and SI. Through the MG&A SI Certification process, you will apply and demonstrate SI knowledge and skills, and train an individual (or individuals, depending on the circumstances described below) with intellectual or developmental disabilities (a *Learning Partner*) on job tasks.

- ◇ The first part of the MG&A SI Certification process includes:
  - effectively determining the Natural Method to perform a Core job Task,
  - conducting a Task Analysis,
  - training a *Learning Partner* on the task using informing strategies appropriately and
  - taking training data on *Learning Partner* performance.

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- ◇ The second part is to identify a Job-Related or Episodic Task on which a discrepancy analysis will be completed.
- ◇ And, the third part includes:
  - completing a Job Analysis at an employer site and,
  - facilitating training for a *Learning Partner* using the Seven Phase Sequence for Balancing Naturalness and Individual Needs (Seven Phase Sequence), while balancing the needs of the *Learning Partner* and employer.

You will need to discuss the MG&A SI Certification process with your supervisor and negotiate the release time needed to complete the MG&A SI Certification activities that are required. This process will require approximately 45-50 hours of your time over the 20-week period.

## Systematic Instruction (SI) Certification Requirements

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

### 1. Identify a *Learning Partner*

You are required to identify appropriate *Learning Partner(s)* to train on a Core Task using SI; identify an Episodic/Job-Related Task to and complete a Discrepancy Analysis with a *Learning Partner* 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 are required to identify an individual(s) with a significant intellectual or developmental 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*. It is helpful if they have completed the Discovery process however it is not required. MG&A recommends that you have a “back-up” individual in case your initial individual decides not to participate. Any changes with your *Learning Partner* must be reviewed with your Mentor before training begins. Please check with your *Learning Partner’s* agency and acquire the required release of information forms so that information can be shared with Marc Gold & Associates. The release of information should specifically state Marc Gold & Associates. Mentors and the Coordinator will be reviewing all forms, so it is essential that we have permission to view the information required for certification.

At your initial meeting with your Mentor be prepared to discuss 2-3 potential *Learning Partners*, their interests, possible tasks to use for training, and any constraints the *Learning Partner* may have such as transportation, scheduling etc. Your Mentor may ask you to identify a different *Learning Partner* if the individual you selected is not appropriate based on the description above.

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Your Mentor has a tool “Learning Partner & Task Selection Considerations” they may use if appropriate to help you in final identification of your *Learning Partner(s)*.

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

## 2. Complete Required Certification Forms

You are required to complete the following forms:

- a) *Systematic Instruction Certification Signature Page Form*, stating that you have read the handbook and agree with the requirements for certification. This form, on page 14 should be submitted to your Mentor.
- b) *Agreement to Use MG&A Systematic Instruction Webinar Series Form*, giving you permission to view the webinars. This form is emailed to [marcgoldassociates@gmail.com](mailto:marcgoldassociates@gmail.com).

## 3. View Archived Webinars

You are 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. The SI Syllabus specifies the order for viewing and are linked with specific certification activities. To further your understanding of the material, take notes, and discuss and ask questions with your Mentor after viewing the assigned webinars.*

## 4. Maintain Regular Communication with Your Mentor

Maintain regular communication with your Mentor. This can be achieved by phone calls, emails, Zoom, etc. You and your Mentor should discuss the best time and ways to

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communicate and share information on a regular schedule. There is an expectation that your Mentor will respond to you within 48 hours. In order to promote the best learning for you, it is similarly expected that participants will respond to their Mentors within 48 hours. There may also be opportunities to participate in conference calls. These calls give you an opportunity to collaborate with other people pursuing certification in Systematic Instruction.

## 5. Use the SI Syllabus

Actively follow and use the SI Syllabus. The Syllabus outlines the sequence of activities, the performance standard that must be demonstrated for each learning activity, and materials to support you and help you stay on track for successful completion. The SI Syllabus can be found on the [Marc Gold & Associates website](#). Use the SI Syllabus to reflect and record key learning, new insights, learning activities that you successfully completed and are approved by your Mentor, time to complete and dates for each learning activity. This must be updated and submitted monthly to your Mentor.

A final SI Syllabus is submitted to your Mentor when all certification requirements have been completed and successfully demonstrated to your Mentor's approval.

## 6. Read the *Systematic Instruction and Job Site Supports Manual*

Read the *Systematic Instruction and Job Site Supports* manual completely, paying specific attention to the sections noted in the SI Syllabus. Record your learning in the SI Syllabus. You will discuss the manual and how the information relates to the tasks and the *Learning Partner* that you are training in order to assure your understanding of the concepts.

## 7. Familiarize Yourself with the SI Forms

You are required to use and complete the following forms for MG&A SI Certification, which are located on the [Marc Gold & Associates Website](#). These forms are:

- MG&A Content Task Analysis Form
- MG&A Task Analysis Data Form
- MG&A Discrepancy Analysis
- MG&A Job Analysis Form

Samples for each form are available on the [marcgold.com](#) website to assist you.

## 8. Identify and Train a Core Task to Criterion, a Job-Related/Episodic Task and Complete a Discrepancy Analysis Using the “Eight Task Training Steps” Below

You are required to identify and train a Core Task and train it to criterion with your *Learning Partner*, demonstrating understanding, knowledge and of SI concepts, values, and strategies. You will also identify a Job-Related/Episodic Task and with your *Learning Partner* complete a discrepancy analysis.

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Identify and discuss with your Mentor possible job tasks that represent each of the 3 Types of Tasks (Core, Episodic, Job-Related). Your Mentor has information available to help you identify tasks to develop your teaching skills and align with your *Learning Partner's* interests. These include a Career Cluster list and examples of tasks to help you think beyond traditional tasks taught to individuals who find it difficult to learn. You must have Mentor approval for the Tasks selected to use for training.

## Eight Task Training Steps

Each Step must be reviewed and approved by your Mentor before proceeding to the next step. You may be asked to change, revise or repeat if it does not meet MG&A SI performance standard.

*To video your training sessions, you must have another person video or use a tripod. Make sure the video clearly captures the training: your actions, the Learning Partner's actions. Your Mentor must be able to see what took place as if they were actually observing the training.*

### **Step 1** Identify Task for Core Task training.

- 7.d Submit job task to Mentor for review, discussion and approval.

### **Step 2** Determine Method

- 2.a Observe Task being performed and determine the natural/typical method to perform the Task.
- 2.b Learn the Task yourself using the Natural Method.
- 2.c Video the Natural Method. Video must clearly show the Natural Method being performed by the natural employee/trainer.
- 2.d Submit video of Method to Mentor for review, discussion and approval based on the performance standard in the SI Syllabus.

To ensure your Mentor knows who and what is submitted, label the video with:

- 1) Your initials, 2) Type of Task, 3) Name of Task, 4) "Method"

### **Step 3** Conduct a Task Analysis

- 3.a Analyze the method, identify and write the Content Steps that accurately reflect the natural/typical Method using the MG&A Content Task Analysis form.
- 3.b Submit written Content Task Analysis to Mentor for review, discussion and approval based on the performance standard in the SI Syllabus.

### **Step 4** Define Criterion Performance and complete MG&A Task Analysis Data Form

- 4.a Determine Criterion Performance
- 4.b Transfer the Content Steps identified in Step 3 Content Task Analysis, to the blank MG&A Task Analysis Data form.
- 4.c Complete entire form with required information

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- 4.d Submit Task Analysis Data Form with Criterion Performance to Mentor for review, discussion and approval based on the performance standard in the SI Syllabus.
- 4.e Discuss with Mentor plans for conducting the training trials: frequency, length, location, etc.

### **Step 5** Conduct Initial Training session with *Learning Partner*

- 5.a Demonstrate to *Learning Partner* how to perform the Task using the Natural Method.
- 5.b Using SI teaching strategies begin training your *Learning Partner* to perform the Task. *NOTE: Plan with your Mentor how many cycles should be completed for the initial training session.*
- 5.c Video your training with your *Learning Partner* doing the Task during one of your beginning training sessions to record an early cycle of their learning the Task. The video must show you training the *Learning Partner*, using the Natural Method, Content Steps and Informing Strategies and be clear for the Mentor to review and provide feedback.
- 5.d Record training data on your Task Analysis Data Form completed in Step 4.
- 5.e Document in the reflection column of the SI Syllabus how SI training strategies, principles and techniques were applied to organize information and provide information and support to teaching the Task.
- 5.f Submit video of Initial Training and Task Data Form to Mentor for review, discussion and approval.

To ensure your Mentor knows who and what is submitted. Label the video with:

1) Your initials 2) Type of Task 3) Name of Task 4) "Initial Training Trials #'s".

### **Step 6** Continue training to mid-point learning/performance.

- 6.a Video your training with your *Learning Partner* after he/she has clearly learned some of the steps that will show a mid-point cycle of their learning.

The video must show you training the *Learning Partner*, using the natural method, content steps and informing strategies and be clear for the Mentor to review and provide feedback.

To ensure your Mentor knows who and what is submitted label the video with:

1) Your initials 2) Type of Task 3) Name of Task 4) "Mid-Point Training Trials #'s".

- 6.b Record training data on your Task Analysis Data form.
- 6.c Document in the reflection column of the SI Syllabus how SI training strategies, principles and techniques were applied to organize information and provide information and support to teaching the Task. Note any changes in approach from the initial training cycle.

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**Step 7** Train until Criterion is reached—a cycle of performance that reflects criterion performance by the *Learning Partner*.

- 7.a Video your *Learning Partner* when she/he has met Criterion Performance. The video must clearly show the *Learning Partner* performing all steps topographically correct with no assistance to the defined criterion.
- 7.b Record training data on your Task Analysis Data collection form until criterion performance has been reached.
- 7.c Document how SI 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.
- 7.d Submit video of Criterion Performance and Task Data Form to Mentor for review, discussion and approval.

To ensure your Mentor knows who and what is submitted label the video with: 1) Your initials 2) Type of Task 3) Name of Task 4) “Criterion Performance Trials #’s”.

**Step 8** Identify an Episodic or Job-Related task on which to conduct a Discrepancy Analysis.

- 8a. Discuss with your Mentor and get approval for the task.
- 8b. Video the Natural Way and write the Content Steps, Natural Cues and Natural Consequences for a typical learner on the MG&A Discrepancy Analysis Form and submit to your Mentor for approval.
- 8c. Perform the Discrepancy Analysis with your *Learning Partner*, complete the Form and submit to your Mentor.
- 8d. Discuss with your Mentor the video and your experience.
- 8e. Document your reflections on the SI Syllabus in the reflection column.

*Note: To video your training sessions you must have another person take the video or use a tripod. Make sure the video clearly captures the training; your actions, the Learning Partner’s actions. Your Mentor must be able to see what took place as if they were actually observing the training.*

### 9. Complete the Seven Phase Sequence

You are required to complete Seven Phase Sequence as described below.

For this simulation, you will:

- A. Identify a local employer willing to have you conduct a Job Analysis and facilitate a simulated 1st day at work (30 minutes) with your *Learning Partner*.
- B. You may use a third party, such as a manager or agency job developer, to help you source and negotiate the employer’s participation.
- C. Review and discuss with your Mentor the potential employer, how to complete a Job Analysis and the specific Job Task you are selecting; get approval to proceed.



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- D. Conduct a Job Analysis and complete the Job Analysis Form, include a video of the Natural Method, Task Content Steps, data sheet for the specific job task selected for the facilitated job training simulation. Work with the Natural Trainer to ensure you know how the task is performed using the Natural Method.
- E. Submit completed Job Analysis with Natural Method video, task content steps and data sheet for the specific job task to be trained to your Mentor for review, discussion and approval prior to training.
- F. Facilitate a simulated Seven Phase Sequence activity with the Natural Trainer teaching your *Learning Partner* at the employer site.
- G. 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.
- H. During simulation, you will facilitate the training with the Natural Trainer and observe how they provide information to the *Learning Partner* and if you need to implement any of the back-up phases. The training must be recorded, and descriptive notes of the 30-minute facilitated training session must be provided as well. (There is a 7 Phase Sequence Form available for use or reference.)
- I. Submit your video and training documentation of the actual Job Simulation to your Mentor for review, discussion and approval.

To ensure your Mentor knows who and what is submitted label the video with: 1) Your initials 2) Job Simulation 3) Type of Task 4) Name of Task.

### 10. **Submit the Required Documentation to Your Mentor**

After all of the certification requirements have been successfully performed to standard and approved by your Mentor submit the following documentation on a thumb drive to your Mentor for a final review and approval:

- A. SI Syllabus with dates, total time & learning insights.
- B. Core Task; Content Steps, Task Analysis Data Form showing criterion performance, and video showing *Learning Partner* criterion performance.
- C. Discrepancy Analysis Form and video showing *Learning Partner* performance.
- D. Seven Phase Sequence Job Simulation; Job Analysis, Task Content Steps for Job Task trained, video of actual Seven Phase Sequence facilitated session and documented observations on how the Seven Phase Sequence was implemented in the simulation.

***NOTE - VIDEOS will not be used for any other purpose without appropriate consent and permission from participant and Learning Partner.***

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## Responsibilities of the Person Seeking Certification

It is your responsibility to read all documents given to you, including the handbook and *Systematic Instruction and Job Sites Supports* manual, respond to all emails, phone calls, and watch all webinars. You should respond to any emails your Mentor sends to you within 48 hours. You should participate in all calls set up by your Mentor. Complete all required forms, documentation and task training with your *Learning Partner* and have Mentor approval. Record and submit all required videos to your Mentor. Any changes with *Learning Partner(s)* and tasks for training must be reviewed and approved with your Mentor before acting on those changes.

## 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**

1. When a Mentor has made the first contact with you, you are expected to already have identified 2-3 potential *Learning Partners* to discuss with your Mentor. However, if you do not have 2-3 *Learning Partners*, you will be given a two-week window to locate a *Learning Partner(s)* and review with your Mentor. 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. The six months starts from the last day of your Systematic Instruction Gateway Training. Depending on the original Mentor's schedule and workload, you may or may not have the same original Mentor.
2. If you have registered for an additional area of certification but you have not yet completed the requirements for certification in your current area, it is possible to request a delayed start until you do complete the requirements in your current area of certification. However, you must start the additional area of certification within six months of that area's gateway training.

### **Systematic Instruction HOLD**

This HOLD policy differs from the delayed start policy in that the participant has already started the process: i.e. viewing webinars, reading articles and having contact with a Mentor. You will have up to four weeks from your official start date to finalize selection of your *Learning Partner* and Core Task to train. Please note that this four-week time frame is part of your 20-

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week timeline—not an additional four weeks. After the four weeks if you do not have a *Learning Partner* or Task, MG&A will place you on hold until you have a *Learning Partner* and Task for training—it is then your responsibility to let MG&A know when you have a *Learning Partner* and Task for training. 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. The six months starts from the last day of your Systematic Instruction Gateway Training. Depending on the original Mentor’s schedule and workload, 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 workload 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 9 hours of Mentoring, additional Mentoring hours will have to be purchased separately from the extension fee. Mentoring fees are \$75/hour.
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.
5. MG&A does not recommend a participant pursue two areas of certification simultaneously during the same 20-week time period—each area’s requirements are too extensive to accomplish more than one certification in the same 20-week time period. Please realize that if you choose to pursue two areas during the same 20-week time period, time extensions will not be granted based on the pursuit of two certifications simultaneously.

### 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.

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## Stopping the Certification Process

1. Participants who have not started the Core Task requirement by week ten (10) due to on-going lack of responsiveness to Mentors or repeated delays with requirements will be dropped from certification because there is not enough time remaining to complete the three major SI requirements to MG&A standards. This does not include delays caused by participant or *Learning Partner* emergencies.

Starting the Core Task is inclusive of all of the following:

- a) Identifying the Task and obtaining approval from the Mentor
- b) Completing the video of the Natural Method
- c) Defining the Content Steps of the Natural Method and Task Data Form
- d) Submitting a video of initial training and training data to the Mentor

2. Participants whose Core Task requirement does not meet standards as defined by the requirements and the performance standards will be dropped after 3 attempts to make the necessary improvements and demonstrate SI knowledge/skills.

If you are still within the 20-week timeframe but have used the 9 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 as 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 SI Certification.**

## Ethical Standard

MG&A provides you with manuals, samples of work to be performed, PowerPoint's and webinars to use as resources. Our goal is to provide you with resources that will enhance your opportunity for success. Please make certain that you do not copy information from our resources or from other participant's work and submit as your own work. If your Mentor does find an inadvertent plagiarism error, the Mentor will call your attention to the error and ask you to correct the form. However, if the plagiarism is major (copying entire sections, submitting someone else's work as your own), you will be dropped from the certification process without any refund and will lose the opportunity to seek further certification from MG&A.

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## 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 webinars and read <b><i>Systematic Instruction and Job Site Supports manual</i></b>	10 hrs.
3.	Identify <i>Learning Partner(s)</i> & make arrangements	5 hrs.
4.	Task identification, training preparation, training	12 hrs.
5.	Discrepancy Analysis design and baseline	3 hrs.
6.	Seven Phase Sequence Job Analysis & simulation	8 hrs.
7.	Editing and uploading of videos	3 hrs.
8.	Submission of all final documentation and uploading	2 hrs.
	Total hours	50 hrs.

Please sign the following page of this handbook and send to your Mentor to indicate your understanding of the requirements for the SI Certification and your responsibilities to meet these requirements.

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## Systematic Instruction Certification 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.

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Print Name

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Agency

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Signature

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Date