

C/A/R/T/A Method



A minimalist approach to designing and delivering LIVE remote learning courses that stimulates participant's involvement.



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Introduction

What is the CARTA method?

CARTA is a method to tailor and synchronously deliver remote training sessions in ways that maximize the participants' active involvement.

By “remote training” we mean a course format that facilitates a trainer’s usage of video, audio, and specific remote technologies to support the synchronous interaction with the course participants. This format is complementary to the traditional e-learning and online learning formats that offer course participants access to sets of documents, videos, or other types of content, which they can utilize at their own pace (that is, a-synchronously), in the absence of a trainer or educator.

Certain elements of this method have been employed in past years, but the consolidation into a single form—the current one—was achieved in the wake of Axioma Solutions training team delivery of over 120 online sessions in 2020.

Successful practices have been preserved, refined, and validated in co-operation with other trainers from various fields of work who deliver remote sessions within local and global companies.

The meaning of CARTA acronym:

- **C**ollaborative
- **A**daptive
- **R**emote
- **T**raining
- **A**ctivities

Components

The method has the following components:

- The CARTA manifesto, the method’s pillars, values, and principles
- The process of delivery for remote training (i.e., strategies for participant involvement, roles, process steps, types of activities, content transformation/ adaptation)
- Best practices
- Library of activities, developed by the training community, organized, and published by us.

The CARTA Manifesto

About us

We design, deliver, and facilitate remote and in-classroom training programs that enhance the value of the learning experience.

By working to deliver courses remotely for the employees of various organizations, we observed the following aspects:

- Although in the initial stage remote learning generally is more difficult than in-classroom learning, the results of the former can be similar, if not superior to, the results of the latter once that the trainers have mastered the requisite techniques and instruments.
- There are strong economic reasons that motivate training clients to prefer this method to the traditional kind of delivery. These reasons concern especially the decreased budgetary expense per trained participant, the flexibility of the educational format and group organization, as well as the possibility of balancing course attendance and effort required at one's workplace.
- This new approach increases access to learning by creating fresh opportunities (through simplifying access to the trainer and to certain types of content) and by eliminating geographical barriers and the constraints tied to travel planning and social distancing.

Credo

"We believe that it is our duty to offer a practical method for designing and delivering remote courses, thereby promoting the development of this new form of learning."

A change in the trainers' ways of thinking and attitudes is necessary for success within the new format. In particular, the following ideas need to be adopted:

- Most of the training activities traditionally delivered in classroom can be modified and adapted to the remote format.
- Training-specific techniques and abilities are transferrable online and are as important for the successful delivery of remote training sessions as for the effectiveness of in-classroom teaching.
- Proficiency in the use of digital technologies (e.g., videoconference apps) is necessary to assure the success of remote delivery.
- Any user of an internet browser can enjoy a memorable learning experience by attending remotely delivered training sessions.

"Being part of a new community of remote training professionals, we assume the goal to inspire and support others in attaining professional mastery, to the benefit of training consumers around the world. The pillars of remote delivery, the CARTA values and principles guide our work towards this goal."

Pillars of remote content delivery

In our view, the success of the new remote delivery methods relies on four key pillars:

1. Good knowledge of the specific domain
2. Digital technology savviness
3. Mastery of training delivery
4. Adequate mindset

CARTA values

Our active engagement in remote content delivery and the productive interaction with course participants made us realize that we have been guided by the following values:

- **Collaborative team learning**
- **Adaptability:** trainers and content creators consistently strive to adapt content, to the profile of the audience and the specifics of the learning initiative
- **Intentional flow:** adherence to, or preference for, the utilization of a standard delivery process
- **Respect** for the course participants: acceptance of the fact that each participant finds himself or herself at a particular stage on his or her learning path, that they have personal learning preferences, and that they have their own, pre-formed definition of success with respect to learning.
- **Engagement:** Put the right effort for maintaining the participants engaged
- **Value for participants:** the continuous development of their knowledge, abilities, ways of thinking, and degree of satisfaction.

CARTA working principles.

Remote training program creators may guide themselves by the following principles:

#1 Focus on participant

The state of openness to the course participants' needs is essential to the learning process. The course participants are responsible for their own educational progress, but is the responsibility of the trainer, the sponsors of the learning initiatives, and the fellow co-trainees to assure the environment where any participant benefits from openness, knowledge transfer and skill growth. Whenever you put the participant in the center of the experience you have a great chance of achieving openness to learning.

#2 Positive mood/ low tension

Reduced psychological tension yields learning opportunities. To promote states of low tension it is important for the course participants to get to know one another as well as their trainer and relate to the subject matter in a productive way.

#3 Compensation principle

When kinesthetic elements are few or absent, they will be compensated by audio and visual elements (for experience extension and amplification).

#4 Interchangeability

Beyond the specifics of each kind of content there is a set of reusable activities that can be included in various online courses after being minimally adapted, and the designers of learning activities will invest time and creativity to conceive them in generic and reusable forms.

#5 Content minimization

The remote delivery of courses needs the content transmitted in “presentation” format to be minimized and the content to be converted for usage in practical activities, which must represent 65-75%, if not more, of the total duration of a course. Content minimization constitutes the first step in turning traditional content into remotely deliverable content.

#6 Individual engagement

To compensate for the participants’ eventual reserved attitude, which naturally narrows their engagement, the trainer will allot time to involve each of them in course activities.

#7 Tolerance

Although we encourage trainers and course participants to interact freely, we understand that one or more participants may impose personal limits to interaction with the others (i.e., in terms of privacy and public exposure). Trainers should be open to the unfolding of training activities even in the situations in which course participants wish to have minimal visual interaction (e.g., if webcams are turned off). We accept and respect the occurrence of these cases.

#8 Complete content

The content created by the participants can be disseminated through a variety of software tools. This content is complete only when the results of the participants’ activities are readily available for consultation.

#9 Value realization

Only seldom will the participants spontaneously understand the value received through the remote training course. The session trainer must set up activities that enhance the understanding of this value among all the participants. Debriefing activities support this principle. (For instance: how is this course going to help me? What are its valuable components in my view? How do I prioritize my preferences?)

#10 Structured process

The usage of a structured delivery process yields results that are significantly better than those mediated by the trainer’s charisma. It is easier to learn by following a clear method than by immersion in an environment imbued with the trainer’s personality.

#11 Support for others

Each participant influences the others’ learning experiences, whether he or she is aware of it or not.

Delivery flow

What creates engagement?

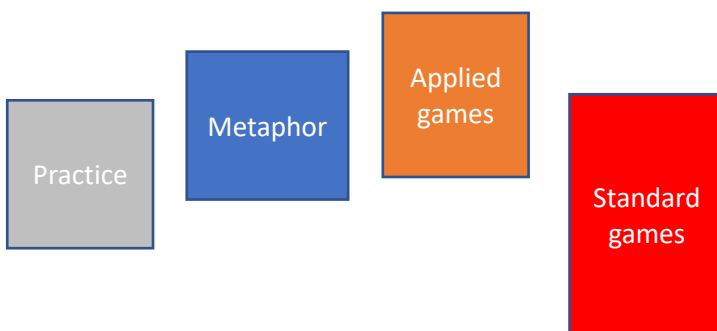
To set up a course with a high degree of interactivity and practicality, remote training program creators will work to modulate activities by employing some of the strategies below:

- Do something.
- Interact with others.
- Create, Discover, Explore, Make Connections.
- Reserve time for personal reflections
- Play games or applied games.

From practical activities to games

The four categories of practical activities that we recommend in CARTA are the following:

- **Practice** learnt notions, concepts, and techniques.
- Using **metaphors** in practice (pretext, image, story, role playing, case study, etc.)
- Using **applied games**: several activities specific to known games are intertwined with the objective of a certain practical activity; integrating games in a practical activity intensifies the dynamism, interaction, and communication of the latter, and increases the level of energy associated with the kind of integrated game.
- Using **standard games**: they are useful to restore energy levels, engagement, connection, communication within teams.



Roles in remote training delivery

To attain remote learning objectives, the persons involved in the training process need to assume roles presupposing distinct responsibilities:

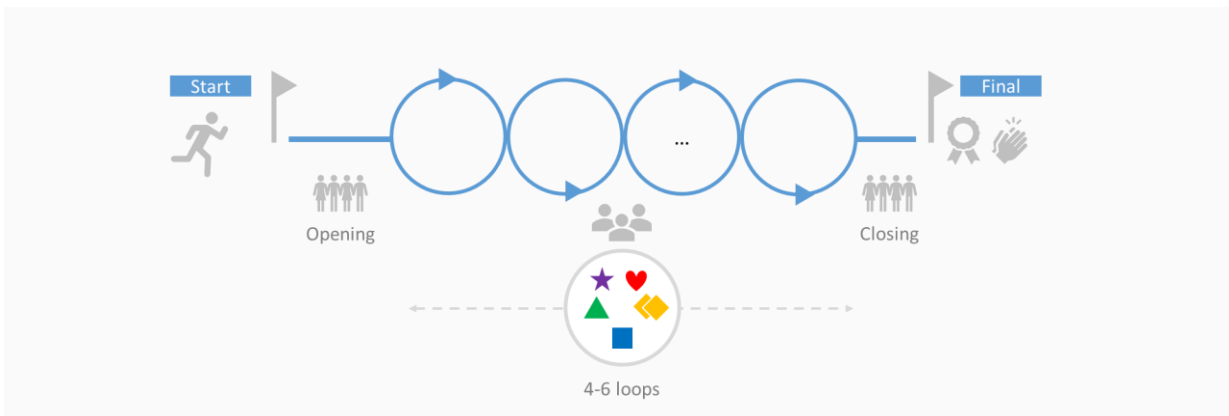
- **Participant**
- **Sponsor of the learning initiative**
- **Session leader**
- **Training assistant / Co-trainer**

- **Designer--i.e.**, the person who designs activities and arrange them in a flow that maximizes the value offered to the participants.

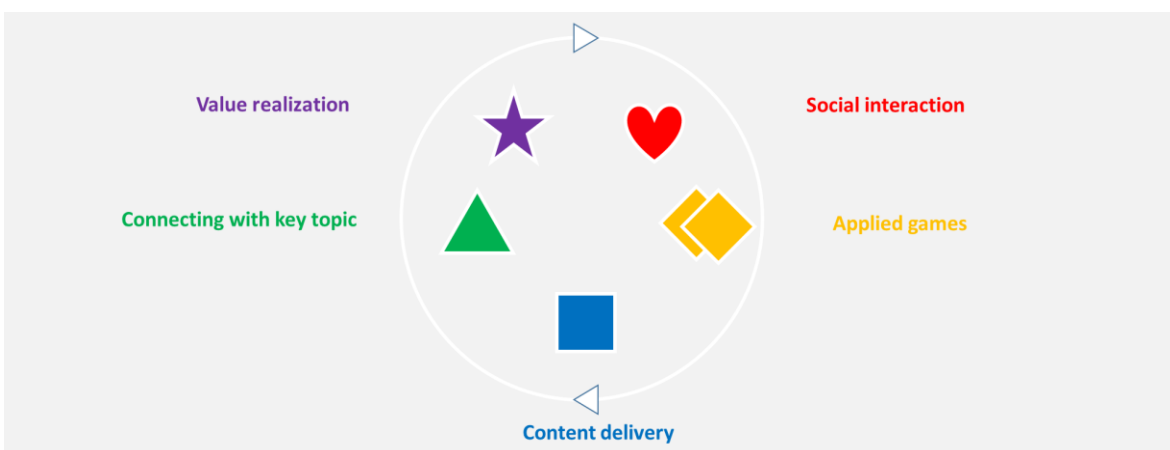
Delivery process

The delivery process comprises three main phases:

1. Session opening
2. Delivery
3. Session closing



The course delivery per se is to be made iteratively, in delivery loops containing a set of essential activities. The creators of training material and the trainers themselves can organize the delivery sequence for each loop as they see fit. The presence or absence of such activities makes it possible to evaluate the training session's effectiveness later.



Types of reusable activities

Those who deliver courses remotely need to be confident that the kinds of activities they employ will generally have the expected effect in terms of the emergence of a good learning environment, a smooth, stress-free interaction with the group, the attitudinal opening of the participants, the participants' realization of the offered value and the upkeep of their energy levels.

Practice has demonstrated that the activities included in the table below are reusable, interchangeable, and highly adaptable—after minor adjustments—to a large range of courses, from Soft Skills to technical or specialist trainings.

Type of activity	Why?	Comments & examples
Connecting participants (among themselves and with the trainer)	This activity reduces stress, stimulates openness, and puts people in “learning mode”	Introducing oneself in pairs or individually, interviewing, collecting expectations
Defining expectations and work rules	Participants are given the chance to express their expectations, while the session leader can clarify or confirm the possibility of the fulfillment of these expectations	Collecting ideas on a tablet or virtual board
Relating to the main subject matter	A component of the first loop, this is the first learning activity	Brainstorming on contrasting topics
Content delivery	This activity consists in the transfer of knowledge to participants, and usually is the main reason for setting up the course	In simplified/ minimal format, by means of 3-4 slides for each idea or message
Game-like activities and debriefing	They support experiential learning	4 types of activity
Social interactions	It gives participants the chance to heighten the human factor within the group learning framework	
Value realization	It stimulates the expression of perceptions, the evaluation of the experience gains, and the projection of scenarios for the future utilization of skills and knowledge	Personal rankings, the level of usefulness to office activity, the thermometer technique, the level of newness

Transition to remote training

The process of modifying the content for remote training.

Transformation premise

“Any activity that proved its value in a class teaching environment will be modified, adapted, or replaced for usage in the new training delivery medium.”

Step 1. Content minimization – simplifying the content while fully satisfying the participants’ need for information.

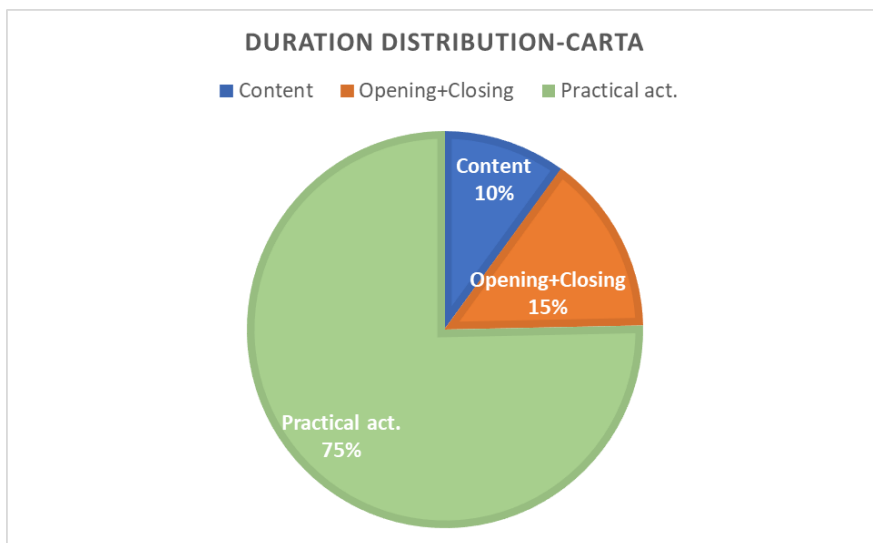
Step 2. Visual amplification – the content is redefined visually, for a deeper impact.

Step 3. Addition of practical activities for participant involvement

Step 4. Delivery and refinement – the content is delivered remotely and is refined based on the participant feedback and in keeping with the observation of the level of engagement and the degree of success in reaching the proposed teaching goals.

The phase of validating the content adaptation.

Step	Validation
Content minimization	The target recommended for content reduction is 1-2 hours for a 2 day in-class course. The trainer is assumed to be capable to present topics, ideas, messages, and support information in a coherent discourse.
Visual amplification	After minimization and visual amplification, trainers could effectively deliver the content of a 2 day in-class course in a 1.5-2-hour webinar. Participants who are exclusively introduced the material of the presentation normally show an understanding of the content that is consistent with the initial intention.
Addition of practical activities	Method-specific reusable games and game-like activities have been added to the minimized content.
Delivery and refinement	Content and delivery form come in updated versions and thus have results that are superior to the previous versions.



Steps to follow in adopting the new work mode:

- embrace the new way of thinking
- develop abilities to use digital training technologies
- modify the activities and adapt the content to the new kind of delivery
- experiment and refine the content until it reaches the level of quality that you desire while making sure you have the capacity to employ the method's structure to deliver it

Best practices (under development)

- Short intro to Zoom/ MS Teams
- Opening sequence (1 hour)
- Activities for familiarization with the subject matter (contrast/ context)
- Team activities and games: 2-4 activities in 4 hours
- 3-4 slides for each idea/ message, at most
- Slides with exercises, with signal and strong visual design
- Videos with written debrief.
- Management of inhibiting factors
- Increase in the importance and duration of debriefing.
- Open cameras
- One-on-one relating and empathizing—at least 10 minutes
- Deepened individual engagement.
- Intensive use of software apps
- Content adaptation: 3-4 days of effort for a 2 day in-class course
- Delivery in 4- or 8-hour session sequences
- Team implementation of the roles of observer and facilitator
- More trainers, training assistant(s) to support team breakout activities
- Printed notebook posted to the participants' home addresses.

CARTA Library of training activities

The CARTA method is freely offered to all trainers for usage as a guide and source of inspiration, and to the benefit of all participants to remote training sessions. Instructors and facilitators are free to use any set of the method's components or the method as a starting point in adapting traditional, in-class taught training to a new format that better addresses the needs of the present. We encourage anyone who wishes to freely contribute to the CARTA project to do so by helping with the development of a library that supports the application of the CARTA method.

The minimal requirements for a contributor's activities are two:

- the activities will refer to a specific category in this guide.
- the activities will be licensed under Creative Commons with Attribution 4 or higher

How can I contribute?

If you wish to contribute voluntarily to the dissemination of the CARTA method guide, you can choose to do any of the following:

- Distribute the guide to anyone whom you have reason to think will benefit from using the CARTA method.
- Invite interested people to the CARTA workshops. Let us know if you need help!
- Translate this guide in a language of international circulation and give us the opportunity to revise the translation before publication.
- Bring to our knowledge any writing errors that you notice in the text.
- Contribute to the expansion of the library of remote training activities.
- If you are using CARTA as a method for remote course delivery, join our "CARTA Practitioners" group at this address: <https://www.linkedin.com/groups/12491773/>

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