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Acknowledgements

This Adult Basic Skills Instructor Training Manual: Effective Professional Development was made possible through the collaboration of many individuals who generously shared their expertise from years of study and training in the field of adult education. To them we extend our heartfelt gratitude. In addition, we extend our appreciation to the countless people serving in literacy roles across the state.

We thank the North Carolina Community College System for its financial and professional support. We extend thanks to President Martin Lancaster, Dr. Randy Whitfield, Ms. Linda Ray, Ms. Katie Waters, Ms. Sillar Smith, and Mr. Robert Allen for continued contributions to the Adult Basic Skills Professional Development Project.

Without the contributions of the Adult Basic Skills directors, instructors, and trainers this manual would be incomplete. We extend to each a hardy "Thank You!"

A special thanks goes to Nathaniel Nusz and Rebecca Long who worked as research assistants throughout the production of this manual and to Janice Voss who edited this manual with assistance from Kelly Larson, Rebecca Long, Nathaniel Nusz, and David Thompson. A special thanks also goes to Rebecca Long who provided the photographs. Thank you, Janice, Beck, Kelly, Nate, and David for your valuable input.

The ABSPD Project also owes a debt of gratitude to our Advisory Council members for their guidance in making decisions on the best means to meet the needs of ABS instructors and students. The members of the 2004 Advisory Council are:
Robert Allen, NC Community College System
Sabra Barfield, Brunswick Community College
Linda Battle, Nash Community College
Judith Byrd, Coastal Carolina Community College
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Sharon McGinnis, Coastal Carolina Community College
Michele Meischeid, Roanoke-Chowan Community College
Patricia Phillips, Davidson County Community College
LouAnn Rasberry, Pitt Community College
Linda Ray, NC Community College System
Sillar Smith, NC Community College System
Katie Waters, NC Community College System
Francis Wheeler, Western Piedmont Community College
Randy Whitfield, NC Community College System

Without the dedication and skill of these wonderful people, this manual would not be possible. Thank you, Advisory Council.
Preface to Trainers

The purpose of this manual is to provide research-based information on planning and presenting high-quality interactive training to meet the professional development needs of Adult Basic Skills professionals. Much research and experience in planning and presenting workshops for Adult Basic Skills professionals precedes its writing.

This manual is reader friendly and inviting. Wide margins provide space to record reflections and notes. The white spaces are intended to aid you to make the content your own, allowing space for notations and adaptations. This furthers the manual’s efficacy as a reference by encouraging customization to meet your needs.

The field of professional development is continually evolving. Theories change, new technology is developed, and the descriptive terminology continues to evolve. However, basic elements of professional development persist within the changing environment. This manual presents fundamental strategies proven over time to be effective for planning and presenting professional development for Adult Basic Skills educators.

This manual is divided into eleven chapters organized with headings and sub-headings to guide reading. Included are suggestions to help you make the transition from trainer-centered professional development to participant-centered activity-based professional development.

Despite the ever-evolving technologies, and the ever-expanding variety of training options, professional development workshops remain the best avenue for delivering training to a large group. Therefore, the first ten chapters of this manual focus on planning and presenting professional
development workshops that result in long-term application. However, Chapter 11 provides a comprehensive overview of alternative activities for those who wish to offer professional development through different mediums.

Planning is the key to workshop success. Presentation planning begins the moment you say, “Yes.” Begin planning and working on the presentation immediately.

Chapter 1 provides an overview on how to plan the logistics of a workshop. Just as the logistics of the workshop must be planned, so must the workshop presentation. Chapter 2 provides an overview of planning the presentation. Subsequent chapters complement the first two chapters by providing in-depth, research-based information on planning effective training.

The first step in designing a training presentation is to determine what training need exists and then learn as much as possible about the participants. Chapter 3 provides information to help you customize your workshop to meet participants’ needs.

The single most important ingredient for designing training is a clear sense of what you want to accomplish. Chapter 4 guides you through developing workshop goals and objectives.

The opening exercise is an important element at the beginning of any workshop. It is important that participants’ initial experience be one that actively involves them in learning. Chapter 5 provides insight for creating great beginnings that involve participants.

An important aspect of your planning is the selection of methods, strategies, and techniques that best suit your presentation style and increase learner retention. Chapter 6 provides guidance in selecting
methods, strategies, and techniques to enhance training.

Diversity creates opportunities. Often trainers are faced with a mix of diverse learners. Training to accommodate differences and meet individual learning styles while addressing adult learning needs is discussed in Chapter 7.

When workshop activities are supplemented with visuals both short-term and long-term impact is maximized. Chapter 8 guides you in the selection of visual media to enhance your presentations.

Ever heard the phrase, “It’s not what you say but how you say it?” This is especially true in training. Chapter 9 offers suggestions to help you enhance your presentation skills with tips on how to handle disruptions.

Evaluation and measurement should begin before the training starts. Chapter 10 establishes criteria for measuring workshop success.

A bibliography is included for those who would like further research-based reading to enhance their effectiveness as a provider of professional development.

Use this manual extensively to make your workshop facilitation efficient and effective learning. Regardless of the model employed, planning is the most important aspect of workshop success. The better prepared you are, the more effective you will be as a trainer.

This manual is the 9th in the Adult Basic Skills Professional Development Instructor Training Manual Series. The content of each manual is intended to enrich the users knowledge base and provide opportunities for professional development. For a complete listing of training manuals, videos, and CD-ROMs available visit our web site at www.abspd.appstate.edu.
Chapter 1
Planning a Workshop

Workshops provide opportunities for professional development. Many people have attended workshops; they are aware of the opportunities for efficient learning of new skills and concepts as well as the reshaping and relating of old ones. Effective workshops

- create environments in which participants feel free to ask questions and enter into discussions,
- involve participants in learning and encourage sharing of information,
- encourage participants to interact and build on the experiences of others, and
- provide participants opportunities to experience and reflect on new and different approaches.

When participants are actively involved in the learning process, they retain more information. As
instructors experience new teaching activities and methods in an Adult Basic Skills workshop, they begin to think about what and how they are teaching. As a result, they are more likely to implement new instructional strategies.

One desirable outcome of a workshop is for participants to modify classroom activities by applying input and feedback from workshop discussions. When workshop participants share common problems and issues while exploring solutions, they develop new perspectives. They react with peers and adjust their personal plans of action. The confidence of workshop participants increases when their opinions and ideas are well received by peers.

Sharing ideas among colleagues provides new insights into a variety of teaching techniques, thus expanding each participant’s knowledge base. The participants develop skills for choosing methods most suited to their teaching styles and their students’ learning styles. They gain the confidence and knowledge to adapt those methods as needed.

Planning is the central ingredient for the accomplishment of workshop goals. More than any other workshop activity, planning is critical. When planning your next professional development workshop consider the ideas presented in this manual.

Working as a Training Team

When possible share the planning and presentation of the workshop with one or more colleagues. Discussing ideas can raise the quality of the final product. Combining ideas and resources often reduces the number of oversights and
complications. Remember the old saying, “Two heads are better than one.” The training team can continue to work effectively and efficiently throughout the workshop presentation and evaluation phases.

During the workshop, team members work together to ensure success. While one person facilitates, another assists with routine tasks such as organizing equipment and distributing handouts. With team support the presenter can concentrate on conducting the session, while other team members observe and respond to the reactions of participants. If an emergency arises a co-presenter can proceed smoothly while another team member responds as needed.

Co-presenters may interact verbally during the workshop creating a relaxed learning atmosphere. Expressing different opinions can be used to show a variety of perspectives and should be encouraged as long as it does not discourage participant discussion. Keep discussions positive and monitor how long participants speak. When co-presenters comfortably interact and inject appropriate humor or friendly disagreement into discussions, workshop participants may interact more freely. Mutual support among co-presenters contributes to a lively, natural, and productive session.

Working as a team carries over to the workshop evaluation phase. During the evaluation process, team members share reactions and provide feedback on their impressions of the workshop. Team members can help each other identify successes and problems to consider when planning the next workshop. Reading and interpreting participants’ written comments should also be a shared activity among team members. Multiple perspectives allow better understanding of the intent of participants’ comments.
Defining the Target Group

Experienced educators know how critical it is to teach at the learners’ level. Workshops are no different, although it is often difficult to evaluate the prior background and level of understanding of prospective participants. Making this determination, however, is central to conducting a successful workshop.

Carefully define the target group. The selection of worthwhile workshop activities and information is contingent upon your knowledge of the audience. Trainers should invest a significant amount of time in this process. Trainers should not only consider the knowledge base but possible variety of participant attitudes. For example, if the target group is comprised mainly of literacy instructors who are not computer literate and a computer workshop is planned, a session dealing with computer basics is advisable. When participants are expected to have limited background knowledge, then more time should be devoted to “setting the stage.”
Carefully evaluating the target group helps prepare presenters to anticipate deficiencies and make adjustments that improve the overall workshop experience. Just as planning is the most critical phase of the workshop, defining the target group is the most critical phase of the planning process.

Selecting the Topic

What are the goals of the workshop? What long-range benefits result? Should training objectives focus on imparting knowledge, enhancing comprehension, or demonstrating applications? The answers to these questions are the basis for topic selection.

Should the workshop serve as a general introduction or should it have a specific focus? Is there time to address a broad topic? What basic information will require reviewing? Would it be better to focus on a specific aspect? For example, conducting a workshop on teaching dyslexic students might be better than trying to offer a comprehensive workshop on learning difficulties in general. Which approach will best address the participants’ background knowledge and needs?

Once the workshop goals are carefully and thoroughly defined, determine the specific learning objectives. State learning objectives in terms of what participants are expected to be able to do after completing the workshop. When writing training objectives complete this sentence, “The participant will be able to ...” Do this as many times as needed to list the training objectives the workshop can reasonably be expected to accomplish. The completed training objectives should contain action verbs such as “identify,” “prepare,” “explain,” “evaluate,”
“organize,” “compute,” “construct,” “select,” or “justify.” For example, “The participant will be able to design activities which develop critical thinking skills,” or “The participant will be able to apply research-based teaching methods.”

Training objectives are valuable references when determining workshop content and choosing instructional methods. Referring to them throughout the planning process provides consistency in instructional design. In addition, these training objectives give focus during the evaluation process. When introduced to the training objectives, participants can use them to organize their learning.

The general goals and specific training objectives provide a basis for developing an initial outline of the workshop schedule and serve as a guide for subsequent schedule adjustments and modifications. Choose workshop activities that adequately address defined goals and objectives.
Planning for Optimum Size

How many potential participants will be attracted by the workshop topic? How many will benefit from the type of workshop you deliver? Is there a minimum number of workshop participants required to have successful interaction? Is there a minimum number required to meet workshop goals and objectives? The answers to each of these questions help determine appropriate workshop size.

The structure of the workshop also has a significant impact on the optimum number of participants. For example, if you believe learning is enhanced by small group interaction then consider what group size and number are manageable and productive. Is the number of participants sufficient to support this workshop structure?

What if there are more participants than expected? Consider the adjustments necessary for accommodating more registrants than originally
expected. What is the maximum number of participants the workshop structure can accommodate? Is it possible to limit participant number? If not, make contingency plans for a larger room and more handouts. The available facilities, money, or number of presenters dictate the maximum workshop size. Also, consider the impact a large group has on learning. Failure to consider group size can be disastrous.

Planning Workshop Length and Location

Two major considerations contributing to workshop success is length and location. When planning workshop length, consider first the amount of time necessary to adequately present essential information to achieve the workshop objectives. Allow for possible complications and delays and allot adequate time for discussions and questions. Remember to be flexible.

If the workshop exceeds two hours consider how breaks and time of day might affect the learning environment. Would it be better to have one long workshop or a series of shorter workshops? Although a series of shorter workshops might allow participants to enter each session invigorated, there are other issues such as attendance to consider.

Examination of the target audience can help you decide whether it is better to offer one long session or several shorter sessions. Some participants may be unable to attend on any given date. If the quality of the workshop would be compromised for those unable to attend all sessions then the longer workshop would probably be the preferred design.
How does workshop participation fit into the participants’ workday? If breaks are used to perform daily responsibilities, can the workshop be adjusted to accommodate outside needs?

Once the length of the workshop has been set, determine the best time of day for it to be held. Is it better for participants to attend during the morning, afternoon or evening hours? If the workshop is for instructors, what time has the least effect on teaching schedules?

For multi-day workshops, the maximum length of time participants can reasonably be absent from jobs and families is another consideration. After factoring in travel time, is it easier for most participants to be away for longer periods of time or be away more than once for a shorter length of time? Would either plan reduce the number of participants? How would less participation affect the achievement of workshop goals and objectives?

Cost also must be considered. Who is responsible for paying the participants’ travel expenses? This answer may have a significant impact on the number of attendees.

Where will the workshop be held? The length of the workshop and season of the year often
Chapter 1: Planning a Workshop

determine location availability. Consider the length of the workshop in conjunction with its location since each can limit the other. When workshops are presented at state or regional conferences, issues of length and location may be irrelevant. However, the competition of other conference sessions may then come into play.

In deciding the location, a major consideration is the room layout and design. The workshop size plays an important role in the room type and design. Is auditorium seating adequate or do you need movable tables and chairs for group work? Will refreshments be served? Is food allowed in the room? Is there room for participants to move around for planned activities? Are restrooms located nearby? All of these factors play into the success of workshops.

Sometimes, workshops are conducted at distant locations to reduce distractions or to take advantage of quality facilities. Consider whether the distant location improves the workshop’s learning environment, affects attendance, and justifies the added cost.

Even though an off-campus location may seem desirable, carefully explore the options. Two important considerations are the comfort of participants and whether they can remain focused for the desired length of time in that environment. The off-campus facility should provide a private training site, few distractions, adequate seating capacity, comfortable temperature, availability of appropriate instructional technologies, and the opportunity for relaxation and refreshments between sessions. Other factors to be noted when choosing facilities include: accessibility, accommodations for persons with disabilities, availability of parking, safety of participants, good meeting room acoustics, and the experience of the facility in hosting educational workshops.
The best location and even the best workshop format may depend on the time of year, month, or even the week chosen for the workshop. Decisions about time and place certainly have a bearing on each other. They also affect and are affected by other planning considerations and decisions.

If the workshop is to be offered more than once, consider whether it should be offered at a different location and whether it will address the needs of a different audience. The decision to offer a workshop more than once affects other planning decisions.

Since there are usually last minute problems and complications, someone on the planning team should arrive at the location the day before the workshop. The first task of this team member is to check meeting room arrangements. They should also check other accommodations and menus if meals are being provided. When checking meeting rooms ensure that the room layout is as requested. Is the furniture arrangement conducive for the planned activities? Check to see that there is adequate seating for the number of participants expected. Is there access for persons with disabilities, adequate lighting, good ventilation, and comfortable temperature?

Is there enough food and beverage for breaks considering the number of participants expected? Are the menus consistent with what was requested? Is there sufficient and adequate equipment for the presenters to proceed as planned? Was the equipment left in the appropriate meeting room, and does it work properly? Since bulbs burn out and other equipment problems may occur, have replacement bulbs or backup equipment. A backup plan is also advised. For example, have handouts prepared as a backup in case of electrical difficulties.
Timing Publicity

The timing of publicity makes or breaks a workshop. Potential participants should receive information early enough to schedule the workshop and complete the registration process. If publicity is too early, the workshop may not receive immediate attention. Workshop advertisements may end up on the bottom of a pile, and the publicity be forgotten. The first notice should arrive between one and three months prior to the actual workshop. Remember you, too, can have emergencies and become overwhelmed, so plan ahead. Knowledge of prospective participants helps you decide whether to send reminder notices.

Taking time to prepare eye-catching brochures pays off. Attractive and friendly fliers serve notice that the workshop will be pleasant and productive. Print brochures or fliers on distinctively colored paper to give them prominence on cluttered desks. Select a color that photocopies well to make it easier for participants to share the notice with other prospective workshop participants.

Depending upon the target audience and the size of the proposed workshop, the workshop can be advertised by sending potential participants simple three-fold brochures that fit into business envelopes, fliers, form letters, or catalogues. If potential participants cannot be easily identified, alternative marketing techniques include posters, newsletters, newspaper advertisements, and electronic bulletin boards. Personal contacts are a

**Workshop Publicity**

*Use short sentences.*
*Use familiar words.*
*Use present tense.*
*Use action words.*
*Use personal pronouns.*
valuable supplement to any of the above techniques, and the personal touch is likely to increase the registration rate.

Written information which is used to market the workshop should be worded as simply as possible. Use short sentences and familiar words to get the message across. Use present tense and action words to give the message a sense of urgency. Use personal pronouns so that the potential audience feels they are being addressed as friends. Write with enthusiasm so readers want to share the excitement. The most important guidelines for preparing a workshop advertisement are to:

- keep it short so prospective participants do not postpone reading, and
- clearly outline what participants will gain from investing their time in the workshop.

**Registration**

The registration process should be clearly communicated to potential participants. Carefully explain the registration process in all pre-workshop publicity. Include the date, time, location, workshop topics, and cost. Workshop registration forms should be easy to complete. Have several people proofread the copy; working as a team can help prevent major oversights.

Using today’s world of technology, plan multiple means of registration. Regardless of the registration procedures used, publish telephone and fax numbers and an e-mail address so prospective registrants can ask questions. Keep complete workshop information near the phone so all questions can be answered quickly.
Be prepared to accept registrations by telephone; have complete registration forms at hand. Failure to have a registration form on hand when taking a phone registration may result in collecting incomplete information, thus preventing contact with the registrant for needed updates or clarification.

How can overbooking be prevented? If more than one person is authorized to accept registrations, there exists the possibility of overbooking. Canceling a reservation creates an awkward situation. Organize a system to keep an accurate tally of registrants.

Actually, some overbooking may be desirable because emergencies do happen. Larger workshops may be overbooked by as much as 20% without too much risk. However, overbooking a small workshop carries a much greater danger that there may be more than the maximum number allowable. As an alternative, develop a waiting list to allow for cancellations. When deciding to overbook consider potential damage to the learning environment with either too many or too few workshop participants.
Summary

Planning is the key to workshop success. Good planning includes the identification of the target audience and the best methods for reaching participants. Assessment of the target audience ensures a match between topic selection and level of instruction. Planning considerations allow prediction of number of participants so workshop facilities and structure matches participation.

The following checklist can be a valuable aid to the planning process. Although it is not intended to be all-inclusive, it gives you a starting point to plan the various aspects of your workshop.
Checklist 1: Planning

☑ Training Team ____________________________
   ________________________________________
   ________________________________________

☑ Topic ________________________________
   ________________________________________

☑ Preliminary Goals _________________________
   ________________________________________
   ________________________________________

☑ Preliminary Objectives _____________________
   ________________________________________
   ________________________________________
   ________________________________________

☑ Target Group _____________________________

☑ Minimum Number of Participants __________

☑ Maximum Number of Participants _________

☑ Workshop Length__________________________
   ○ Length of Training ______________________
   ○ Length of Breaks _________________________
   ○ Length of Lunch _________________________

☑ Workshop Location _________________________

☑ Date ____________________________________

☑ Time ____________________________________
Room ________________________________

- Seating arrangement
- Handicapped access
- Adequate lighting
- Good ventilation
- Comfortable temperature
- Electrical outlets
- Location of restrooms

Equipment ______________________________

Supplies ________________________________

- Handouts
- Flip chart
- Markers
- Tape
- Other ________________________________

Breaks _________________________________

- Food _________________________________
- Beverage ______________________________

Registration ____________________________

Evaluation plans _________________________

Other _________________________________
Chapter 2
Planning a Presentation

Just as the logistics of a workshop must be carefully planned, so must the workshop presentation. Presenters’ strengths should guide presentation planning without limiting presentation options. The presentation should be planned to meet participants’ needs, interest, and backgrounds. These points must be researched during the planning process. Careful and detailed planning of time frames must consider presentation strategies that speak to a variety of learning styles, yet provide flexibility to address the unexpected. Workshop evaluations serve many important functions; therefore planning them is a part of the overall training process.

Selecting Activities

The most important thing to remember when choosing activities is “variety.” There are two reasons for choosing a variety of activities. First, participants’ interest should be maintained from beginning to end.
Second, participants’ learning styles differ. Using a variety of activities increases the chances for everyone to receive maximum benefit. To keep the audience alert and attentive, organize the workshop so participants experience sessions in different ways. Similar benefits accrue by providing variety in the activities within each session. It is also important to select activities that fit participants’ interests, abilities, and level of maturity.

The presenters must be reasonably comfortable with the chosen activities. However, effective presenters enjoy trying new ideas; ideas best suited to achieving workshop goals and objectives. Time and cost can limit the types of activities used, but those considerations should be made during the workshop planning process. Remember the more activity involved the greater the learning. Plan participatory learning activities such as role-plays, structured exercises, and appropriate games. Also, consider using videos or other demonstrations that model desired behaviors.

Carefully plan the opening exercise. Initial experiences should immediately involve participants. Workshop facilitators learn about their audience by assessing the attitudes, experience, and knowledge of participants during the opening activity. The opening exercise is the best time to begin group building by creating a spirit of cooperation among participants as they become acquainted with each other. Any non-threatening activity that encourages participants to learn names or gets them to share their experiences and backgrounds initiates the group building process.

An important task of the moderator is to create a relaxed and comfortable atmosphere so that group building continues throughout the workshop. The moderator must be prepared for participants who do not respond during this initial session; therefore, contingency plans are important. For instance, it may
be desirable to divide the workshop participants into subgroups or ask pairs of participants who are seated beside each other to discuss questions important to the learning experience.

Other group building activities might involve obtaining data by asking participants to complete index cards or short questionnaires. Even non-verbal responses actively involve participants. Quick tabulations, perhaps over a break, provide ideas for discussion to make the workshop a meaningful learning experience.

**Balance Listening With Interaction**

Most participants feel they have something worthwhile to say and like to have opportunities to express their views. Interacting with others is usually stimulating; it helps to internalize information and maintains attention. Also, participants tend to contribute when they are encouraged to express their views. Since the interactive mode has such potential for learning, divide large groups into smaller groups.
Chapter 2: Planning a Presentation

to allow greater participation. In fact, some people feel freer to express themselves in small groups.

Information on how to complete activities should be presented and examples modeled. However, presenting and modeling are not enough. Allow workshop participants to practice skills. For example, when conducting a workshop on using calculators, actually use calculators during the workshop. Following this type of hands-on activity with discussion and reflection time helps participants understand how students might respond. During planning consider how activities might be modeled and practiced.

The participatory workshop model goes beyond normal workshop lectures and group discussions. Activities such as brainstorming, case studies, demonstrations, games, role-playing, and simulations comprise this model. These types of activities provide practice and feedback, increase motivation to further explore a topic, and create a sense of ownership, relevance, and success. Consider the feasibility and potential value of such activities. Detailed explanations for each of these activities are included in Chapter 6 for use in planning your professional development workshop.

When workshop participants have a common background, such as teaching, they have ideas and experiences worth sharing. Sharing also provides
excellent opportunities to look at variations in applications such as those appropriate for accommodating students with learning difficulties or behavioral problems.

In workshops for instructors, use activities that can be easily adapted to the classroom. Participants expect to learn information they can apply to their classrooms. Valuable workshops offer opportunities to learn and practice concrete ideas and apply instructional techniques. Although obtaining good evaluations is not a primary goal, participatory workshops usually result in high evaluations.

### Planning a Workable Agenda

A key for a successful workshop is the development of a workable agenda. It is especially important that you start and finish on time. This can be a real challenge in a participatory workshop, but that challenge can be met with careful planning. One facet of such planning is flexibility. Since groups have different dynamics, flexibility is imperative if the workshop is to meet the needs of participants. Flexibility means preparing alternate activities or presentations for situations in which the planned time frames need adjusting. It may also be necessary to sacrifice activities if previous sessions generate a high interest level, obviously requiring an extended session. Being prepared to substitute a brief activity that enhances a major concept may greatly enhance the value of the workshop. Remember, taking time to build confidence and skills is important. Rushing through a basic portion of the workshop may confuse and alienate participants.

Wouldn’t it be great if no one wanted to leave for a break? Compare that situation to one in which
Chapter 2: Planning a Presentation

everyone is fidgeting as they count the minutes until the next break. Plan for adequate breaks of sufficient length for participants to return refreshed and eager to learn more. Cramming too much information into one session is usually counterproductive. The nature and format of the workshop determines how often breaks are needed. For example, there is less need for breaks during well-designed participatory workshops since active participation encourages movement and dialogue.

When activities and breaks are well planned, productive discussions are likely to continue during break time, thus adding to the value of the workshop. Also consider how important networking is for the participants; this affects the desirability of longer breaks.

It is important to adhere to the agenda, including breaks and free time. Therefore, careful planning of every activity, including breaks, is vital. Time adjustments are easier if each activity has been carefully thought out. The best way to estimate time requirements is to break the workshop into small segments. General guesses about the length of time needed for broad activities are seldom accurate. They are often so inaccurate that it is impossible to adjust the agenda to meet the workshop goals. Therefore, it is desirable to prepare a detailed outline of each segment and thoughtfully evaluate the time by subtopic.

If the workshop lasts more than two days, it is desirable to include some free time in the schedule. This will be especially true if the location offers recreation that is attractive to many participants. Failure to include time for such activities may result in lack of attendance.
Teaching Tools

The plan you develop for the workshop should be supplemented with a selection of appropriate visual media. Handouts, flip charts, and/or transparencies guide discussion and help keep participants cognizant of the workshop goals and progress. To be effective, these tools must be attractive and unambiguous. They should be carefully planned well in advance of the workshop.

Problems with computer and copier malfunctions can delay the best of plans. Prepare workshop materials and tools early enough to be able to resort to alternative devices. If audiotapes, videotapes, or films are the best way to illustrate a topic or technique, early planning provides adequate time for their acquisition.

Chapter 8 provides additional information for selecting, preparing and incorporating these teaching tools into the workshop plan; only then can they become learning tools. Learning tools greatly increase the effectiveness and efficiency of workshops.
Facilitating the Workshop

A good facilitator keeps people on task. Workshop introductions should be brief and should outline goals, objectives, strategies and techniques. The facilitator’s attitude sets the tone for the workshop. Plan an introduction that creates a relaxed, open atmosphere.

Two major functions of the facilitator are to serve as timekeeper and taskmaster. If discussions stray or seem to be getting mired in irrelevant or nonproductive issues, a good facilitator skillfully refocuses participants and aids them to accomplish their tasks.

Often one or two participants dominate discussions. Such participants can be a useful resource when the discussion lags, but often they must be carefully moderated to keep them from “shutting down” everyone else. Probably the most tactful way to handle this situation is with a compliment such as, “That is an excellent point. Let’s get the group to respond to that.” Another way to deter the dominant person is to ask questions that require reflection. Suggest a time limit for responses. Alternatively, enlist the aid of others by asking, “Do the rest of you wish to continue discussing this point or would you like to move on?” If the person must be confronted, then do so during the break to avoid criticizing or embarrassing the individual in front of others. It is unlikely that a participant will become argumentative, or worse, antagonistic. This behavior jeopardizes the entire workshop. It is critical that the facilitator remain calm and in control. Address the situation before the rest of the group gets agitated. Calmly respond to the issues raised, but not the attack itself. Soothe the situation by identifying something in the argument as a good point. After expressing your
agreement with that part of the argument, redirect the discussion to a new topic.

Other personalities may create less serious problems. Responses to a “rambler” might include glancing at the clock, jumping in at pauses, or restating the comment as a lead into the next topic. Tact becomes especially important when dealing with disruptive behaviors. For additional problem solving ideas see the section in Chapter 9 that provides insight for handling difficult behaviors.

If all goes well, and usually it will, the facilitator’s major tasks during the workshop are to guide the discussion and make smooth transitions between topics. The facilitator provides closure on each item with appropriate comments, and then provides smooth transitions by describing how the last topic leads into the next. At the end of each session, the facilitator provides closure by asking participants to summarize the major points or state how the primary goal was achieved. This approach to closure might be used as a transition to the...
evaluation, or in some cases may even be done during the evaluation activity. To enhance participants’ feelings of accomplishment, compliment them and praise their efforts using direct feedback.

Planning for Evaluation and Follow-up

There are many reasons for planning and completing a thorough workshop evaluation. Workshop evaluations may be necessary for continued funding or for gaining administrative support. Thorough evaluations provide documentation of planning efforts and the workshop’s success. Trainers invest much work in planning and facilitating workshops, so it is natural to seek evaluation for the sense of satisfaction it may bring. However, the most important reason for evaluating the workshop is to help with the planning of future workshops. Chapter 10 includes an in-depth discussion about how to evaluate workshop results.

Participants are not the only people who should evaluate a workshop. It is also the responsibility of all workshop planners and presenters to record their observations and reactions. An extremely worthwhile activity is a debriefing session in which all team members share and discuss their opinions and reactions. Debriefing serves as a framework for building and improving future workshops.

Evaluation summaries are of interest to the participants as well as to administration. Participants have a stake in the process and appreciate knowing the reaction of others. It is always advisable to keep the administration informed. This should be done
shortly after completing the workshop, even if subsequent evaluations are planned.

The best indicator of success is the participants’ application of the information and ideas gleaned from the workshop. Consider a follow-up questionnaire to assess how participants actually applied the ideas and techniques. Alternatively, schedule a meeting of former workshop participants to share how they implemented the information and activities from the workshop. In addition, they can give suggestions and observations that other participants might find beneficial.

Sharing Final Thoughts

Planning is the most important ingredient for a successful workshop presentation. Working with a partner or as a team member can help make all phases of the workshop more effective. It can also be difficult.

An important part of the planning phase is evaluating the target group. The intended audience influences the selection of workshop topics, goals, objectives, and focus. The audience is an important consideration in determining minimum, optimum, and maximum numbers of participants to create the most effective workshop. This is important information when selecting a location, date and time for the workshop.

Timing of advertising is critical. The registration procedure should be carefully planned and advertised to eliminate misunderstandings and overbooking.

Keep lectures as short as possible. Choose a variety of workshop activities to keep the participants
interested and meet different learning styles. Plan a workable, yet flexible, agenda for the workshop.

Respect the participants’ time. Start at the scheduled time; otherwise, you do a disservice to those who arrive on time. Do not keep punctual participants waiting for “others to arrive.” Finish on time.

Make every effort to greet the participants beforehand. Learn about their backgrounds and expectations. Some participants may be experts in the subject. Make certain your presentation retains its original crispness, even if given several times.

When you do not know the answer to a specific question, admit not knowing.

Always dress for the occasion. Try not to “overdress” or appear too casual. It is far better to be slightly overdressed.

Keep your words as simple as possible. Avoid terms unfamiliar to the audience. Keep sentences short to enhance understanding. Use transitions to tie concepts together.

The facilitator’s job is to establish the tone of the training and keep participants actively involved. Leave adequate time to complete evaluations. Prepare a summary report using evaluation data as soon as possible after the workshop.

Most importantly, have fun as you plan, present, and evaluate your workshop.

If you remember nothing else, keep in mind the three tested rules for a professional development presentation…Practice, practice, then practice some more!
Checklist 2: Presentation

- Topic ____________________________________
  ________________________________________

- Preliminary Goals _________________________
  ________________________________________
  ________________________________________

- Preliminary Objectives _____________________
  ________________________________________
  ________________________________________
  ________________________________________
  ________________________________________

- Agenda __________________________________
  ________________________________________
  ________________________________________
  ________________________________________
  ________________________________________
  ________________________________________
  ________________________________________
  ________________________________________
  ________________________________________
Possible Activities _________________________
__________________________________________
__________________________________________
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__________________________________________

Possible Evaluation Plan ___________________
__________________________________________
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Follow-up Plan ____________________________
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__________________________________________
Chapter 3
Assessing Needs

Would you like to prepare and conduct a wonderful workshop on a topic that has no value to participants? Would you like to be one of the participants in that workshop? In what sense do you think that such a workshop could be judged a success?

We all want our workshops to be well received. Participants know when they gain valuable knowledge and insights. The best way to insure worthwhile training is to identify the needs of potential participants.

To be effective, a workshop must address a suitable topic. Workshop leaders must insure that the topic is timely and that the topic area is one in which likely participants need additional training. Assessing the type, level, and extent of needed training is equally important.

Most people can correctly guess the result of a coin toss, but statistically only about half the time. Some people can make guesses about the best topic or training needs for a workshop, but consider the consequences of guessing incorrectly. Surely a thorough needs assessment is not only desirable, but,
in fact, is an absolutely essential component of workshop preparation.

The first step in designing a training presentation is to determine what training need exists. Then find out as much as possible about the participants who will be affected. The more assessment data obtained, the better the planning. Good assessment data helps to customize the workshop to meet the participants’ needs. It also dictates the best choices for workshop design modification.

An additional benefit gained from assessment data is the identification of “real issues” to use as the basis for workshop exercises. Many workshops that rely on artificial or simulated exercise situations provide valuable training, but building workshop examples and exercises around current problems, concerns, or issues inspires enthusiasm among participants. The workshop “comes alive” with life
examples. The challenging material is learned more quickly. Even cooperative learning builds on the atmosphere created by using “real issues” identified during the needs assessment.

A thorough needs assessment also provides an avenue for developing relationships with workshop participants. When participants are consulted about an upcoming workshop, they develop a vested interest in its success. They enter the workshop feeling that the leader cares about their training needs and values their input. It is likely that they will participate more freely and encourage participation by others.

Thus far four major benefits have been identified that are likely to accrue from a carefully conducted workshop assessment. These four benefits are:

1. Choosing an appropriate workshop topic.
2. Identifying the most pertinent training.
3. Building workshop examples and exercises around “hot topic” issues.
4. Building a good working relationship with workshop participants.

The first two benefits are vitally important to workshop success, but the last two can make the difference between mediocre and superior workshops. Many additional benefits follow the completion of a superior workshop. One such benefit is the long-term contributions to our society by students who are the recipients of instructor training.
Learning from Needs Assessment

What can be learned from a needs assessment? The following can make or break a workshop:

1. When is a good time for potential participants? What obligations take precedent?
2. What roles and tasks do the potential participants perform? What competencies are required?
3. What expectations do supervisors have with regard to the training?
4. What workshop topics have been requested? In what areas do potential participants feel least competent?
5. What attitudes do potential participants have toward specific training topics? Is technology, anxiety, resentment, or indifference a likely hindrance for some topics?
6. How much is already known about each topic? How much variability in background knowledge exists among potential participants?
7. What successes and problems have potential participants encountered?
8. Is training voluntary or mandatory? What credit is rewarded toward professional development requirements?
9. How well do potential participants know one another?
10. What are the professional problems currently being encountered by potential participants?

11. What relevant skills exist among potential participants that might be useful during the workshop?

12. What are the potential participants’ past experiences with workshops?

Conducting a Needs Assessment

Below are options for data collection. Some options may work better than others in specific training situations. Sometimes a combination of options is most effective.

**Telephone**

Personal telephone calls take time and patience, but allow for refinement of questions to pinpoint valuable information.

**E-mail**

E-mail can be sent en masse, or to one person at a time. Small group discussion of the questions can generate many ideas. However, this method can be limited by the inaccessibility of e-mail.
Written Questionnaires

Data collected is only as good as the questions asked. Be aware that low response rate is often a problem with written questionnaires.

Informal Interview

Informal interviews conducted at professional gatherings or after other workshops generate great ideas. Take advantage of these opportunities.

Personal Visits

Personal visits are likely to produce excellent results. However, they are very time consuming and may be costly.

Read Reports

When pertinent written reports (such as evaluations of previous workshops or needs assessment by various administrators) are available, use them as valuable resources.

The limiting factor on choice of data collection options is usually time or cost. Careful consideration of the options for completing a needs assessment helps make a feasible choice.

When thinking about the types of information needed to plan training, consider asking participants to identify their needs. Going straight to the participants gives them an opportunity to help design their own training. Numerous benefits result from involving potential participants. You may wish to ask:
1. What are your expectations for this training?
2. How could this training help you in your current position?
3. What subjects would you like the training to address?

A sample questionnaire to assess both training and participants’ needs is included at the end of this chapter. Adapt these sample questions to meet your assessment needs.

No Time for Assessment

If you face a situation where training has to be designed and implemented hastily, consider the following techniques and adjust your training accordingly:

- Phone a contact person who knows the participants.
- Phone a few participants and treat answers as a sample of the group.
- Contact others who have provided similar training for their opinions and impressions.
- Talk to participants who arrive early to obtain whatever information possible.
- Design activities for the beginning of your training that will provide information about the group.
Sample 3.1: Needs Assessment

To make sure this training is productive for you, please take a few minutes to respond to the following.

1. My current position is _______________________.

2. I have been to a ____________ workshop before.
   ___ never ___ once before ___ twice or more

3. I would benefit by a general overview of _________.
   (no need) 1 2 3 4 5 6 (strong need)

4. I need to learn more about _____________________.
   (no need) 1 2 3 4 5 6 (strong need)

5. I need to know what ______________ resources are available.
   (no need) 1 2 3 4 5 6 (strong need)

6. I need to know how to _________________________.
   (no need) 1 2 3 4 5 6 (strong need)

7. List three specific questions you hope this workshop will answer for you:
   a. __________________________________________
   b. __________________________________________
   c. __________________________________________

Please return this questionnaire to ________________ by _________________________.

Chapter 3: Assessing Needs
Checklist 3: Assessing Needs

Type of Assessment:

- Training needs
- Participants’ knowledge
- Participants’ skills
- Participants’ attitudes

Data Collection Method:

- Group discussion
- Interview
- Key consultation
- Observation
- Print media
- Questionnaire
- Records, reports
- Tests
- Work samples

Outline your needs assessment plan on the following page.
Chapter 4

Setting Goals and Objectives

The single most important ingredient for designing training programs is having a clear sense of what you want to accomplish. The planning process that began with participant assessment continues by applying what you learned to the selection of topics to be covered. A training goal is a general statement of what the trainer wants participants to learn from the training. It identifies the overall behavior the learners are expected to acquire. Because goals are stated in general terms, they are open to interpretation in different ways. Use objectives to clarify and explain each goal. An objective is much more specific than a goal. A well-stated objective leaves little doubt about exactly what will be done, how it will be measured, and the conditions under which it will be accomplished. This process should culminate in the selection of learning goals and objectives.
Setting Goals

Once you have chosen the basic subject matter, begin planning by setting one or more learning goals. Goals can be affective, behavioral, or cognitive. Learning goals can be refined as the planning process continues. With the assessment data in mind, identify potential learning goals for participants.

Affective goals are the priority when there is a lack of desire or fear about using new knowledge or skills. Behavioral goals are the priority when there is a lack of skills. Cognitive goals are the priority when there is a lack of knowledge.

Although it is possible to design a training program with only one of these types of learning, a design that incorporates all three is more likely to produce lasting effects. When writing learning goals include the areas of affective awareness, behavioral skill building, and cognitive understanding.

Affective Awareness

Affective awareness includes the fostering of attitudes, feelings, and preferences. For example, participants may need to value a certain situation or procedure. Participants may need to become more aware of their feelings and reactions to certain issues or ideas. Examples of affective learning goals are:
➤ Participants will identify….
➤ Participants will select….
➤ Participants will use….

**Behavioral Skill Building**

Behavioral skill building requires the development of competence in the actual performance of procedures, operations, methods, and techniques. For example, after the demonstration participants will practice skills and receive specific feedback on their performance. Examples of behavioral learning goals are:

➤ Participants will demonstrate…
➤ Participants will prepare…
➤ Participants will develop…

**Cognitive Understanding**

Cognitive understanding includes the acquisition of information and concepts related to a given content. Participants are not only expected to comprehend the material, but also to analyze it and apply it to new situations. Examples of cognitive learning are:
 Participants will describe…
 Participants will compare…
 Participants will discriminate…

Writing Objectives

Once learning goals are established, break them down into specific training objectives. Keep in mind adult learning needs. Remember, adult learners tend to prefer single-concept or single-theory training (Zemke & Zemke, 1984). Adult learners want to see immediate value in the skills and knowledge taught and significant application of the training topic (Vella, 1994). Adult learners like to build on prior experience. They expect the opportunity to relate what is taught to what they already know or have thought about (Knowles, 1990).

Be specific about the learning you want participants to experience and the results you want the training to achieve. Each goal should have two or more objectives that, when met, signal goal accomplishment. State objectives so they can be used as effective tools for managing, monitoring, and evaluating training.
Training objectives should be to the point and easily understood. Consider using Bloom’s Taxonomy to move from knowledge acquisition to concept evaluation. A behavioral format reads, “By the completion of this training the participants will be able to ...”

**Understanding Bloom’s Taxonomy**

Bloom’s taxonomy is a hierarchy of skills through which people progress as their thinking skills improve. At the lowest level, they gain knowledge and then understanding. At the highest level they are able to evaluate options by judging outcomes.

Bloom’s Taxonomy can serve as a guide when writing training objectives. The table on the following page lists action verbs based on the hierarchy of Bloom’s Taxonomy. Choosing easily understood action verbs that correspond to the desired level of learning will allow you to write training objectives that can then more easily be related to evaluation. To assist this process, organize objectives in a clear, easy-to-read list.
**Bloom’s Taxonomy**

<table>
<thead>
<tr>
<th>Level</th>
<th>Skill</th>
<th>Key Words</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>LOW</strong></td>
<td><strong>Knowledge</strong></td>
<td>define, describe, identify, list, name, label, recall, recognize, explain</td>
</tr>
<tr>
<td></td>
<td>Finding out</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Comprehension</strong></td>
<td>compare, convert, defend, distinguish, estimate, illustrate, rewrite, classify, translate, discuss, show</td>
</tr>
<tr>
<td></td>
<td>Understanding</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Application</strong></td>
<td>compute, demonstrate, operate, show, solve, predict, build, choose, organize, utilize, identify</td>
</tr>
<tr>
<td></td>
<td>Making use of the knowledge</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Analysis</strong></td>
<td>clarify, order, identify parts, prioritize, analyze distinguish, discriminate</td>
</tr>
<tr>
<td></td>
<td>Taking apart the known</td>
<td></td>
</tr>
<tr>
<td><strong>HIGH</strong></td>
<td><strong>Synthesis</strong></td>
<td>combine, compile, predict, compose, create, design, rearrange, categorize, solve, develop, revise</td>
</tr>
<tr>
<td></td>
<td>Putting things together a in different way</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Evaluation</strong></td>
<td>appraise, criticize, judge, evaluate, support, explain, conclude, contrast, summarize, interpret</td>
</tr>
<tr>
<td></td>
<td>Judging outcomes</td>
<td></td>
</tr>
</tbody>
</table>
Checklist 4: Goals and Objectives

Write goals and objectives for a training program you plan to conduct in the near future.

Review your goals and objectives to see if they meet the following recommendations:

- Goals are written to address affective awareness, behavioral skills building, and/or cognitive understanding.
- Objectives support goals.
- Objectives are easy to understand.
- Objectives are written using action verbs.
Chapter 5

Creating Great Beginnings

Opening exercises are an important element at the beginning of training presentations. Carefully plan the opening exercise. The participants’ initial experience immediately involves them in learning. Workshop facilitators should also be learning during the opening activity; however, their focus is on updating their assessment of participants’ attitudes, experience, and knowledge. The opening exercise is also the best time to begin group building. Group building involves creating a spirit of cooperation among participants as they become acquainted with each other. Any non-threatening activity that encourages participants to learn the names of other attendees or requires them to share their experiences and backgrounds initiates the group building process.

An important task of the moderator is to create a relaxed and comfortable atmosphere so group building occurs. The moderator must be prepared for participants who do not respond during this initial session; therefore, contingency plans are important. For example, you might decide the participants would interact more in subgroups. Alternatively, you
might ask pairs of participants who are seated beside each other to discuss an important question.

Opening exercises can begin the group building process. Obtain data by asking participants to complete index cards or short questionnaires about experiences with specific teaching situations, attitudes toward a particular technology, or some other relevant life experience. Even non-verbal written responses increase participants’ involvement. Quick tabulations of those responses, perhaps over a break, can provide ideas for discussion that will make the workshop a more meaningful learning experience. Raw votes or use of hand signals can also provide instant feedback.

Participants need to be in a receptive frame of mind from the start. What is done before the presentation and during the first three to five minutes has a major effect on how the message is received. First impressions count! Some effective ways of making your learners more receptive include being seen before the presentation, being introduced in a low-key fashion, and beginning with an entertaining icebreaker.

Be seen before the presentation. Greet people as they arrive, introduce yourself, shake a few hands, help with their nametags, and thank them for coming. The more people you meet in advance, the easier it will be to establish and maintain a rapport during the workshop. Repeat aloud participants’ names as you greet them or are being introduced. This technique serves as a memory reinforcer. Greeting participants prior to your presentation can usually help you to relax. In effect, by following this procedure, you are now talking to a group of newfound friends rather than strangers.

Consider writing your own introduction. Make sure the person introducing you uses a low-key approach. It is much better to be undersold at
introduction time, then over-deliver, than to be oversold and then under-deliver.

Begin the workshop with an entertaining icebreaker. Getting the audience involved for the first three minutes makes it much easier to keep them involved for the remainder of the presentation.

**Breaking the Ice**

An icebreaker is an activity done at the start of your session designed to break through the barriers to communication, loosen up participants so they feel at ease, and prepare them for the message of your presentation. The goal is to convert passive observers into active participants.

Humor is one of the best ways to break the ice. If participants smile or laugh in the first couple of minutes, then the rest of the presentation will fall into place. Consider using an icebreaker such as “The Character Survey” on page 55 or a similar activity for a humorous beginning.

If participants do not know each other consider using an icebreaker similar to the “Scavenger Hunt” sample on page 56 to get them up and moving and help them get better acquainted with fellow participants. To help participants bond, change the characteristics on the scavenger hunt card to reflect the characteristics of your participants.
If participants already know each other well or if the same participants have met together several times, consider forming groups to produce a product such as the “Commercials” activity on page 57.

Some people think icebreakers such as these are childish. Our experience, having worked with thousands of people, shows just the opposite. If you do not feel comfortable with the techniques shown here, vary the techniques to make them your own or find icebreakers with which you are comfortable. Do not leave them out! When icebreakers are not included, it takes longer to establish a relaxed environment. Remember, it is important to loosen up your participants from the start, and then keep the presentation moving. MAKE IT FUN!
Sample 5.1: The Character Survey

This survey usually gets a strong response. First show the four different graphics and explain that the shape chosen reveals their character. Ask participants to choose the shape that most appeals to them. Uncover the graphics descriptions, one at a time. The participants will believe this is a serious exercise in psychoanalysis until the final shape, the oval, is revealed...

- **Intelligent**
  - Strong decision makers

- **Lateral Thinkers**
  - Prepared to look at all sides

- **Creative Leaders**
  - Strong imagination

- **Preoccupied with SEX and BOOZE**

Sample 5.2: Scavenger Hunt

Each box identifies a participant characteristic. Ask participants to ask their fellow participants to sign a box that best describes them or something they enjoy doing. The goal is for each box on the card to be signed by a different participant.

<table>
<thead>
<tr>
<th>Scavenger Hunt</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is wearing red</td>
</tr>
<tr>
<td>Drives a sports car</td>
</tr>
<tr>
<td>Drives a truck</td>
</tr>
<tr>
<td>Has 3 children</td>
</tr>
<tr>
<td>Has brown eyes</td>
</tr>
<tr>
<td>Attended Institute at ASU</td>
</tr>
<tr>
<td>Has teenagers</td>
</tr>
<tr>
<td>10+ years in ABS</td>
</tr>
</tbody>
</table>

Sample 5.3: Commercials

1. Divide participants into teams of six or fewer members.

2. Ask each team to create a thirty-second TV commercial that advertises their team, their organization, their common job, or the importance of the training topic.

3. The commercial should contain a slogan and visuals.

4. Explain the general concept. An outline of the commercial is sufficient. However, if teams want to act out their commercial, let them.

5. Before each team begins planning its commercial, discuss the characteristics of current well-known commercials to stimulate creativity.

6. Ask each team to present its ideas. Praise creativity.

Checklist 5: Great Beginnings

What are the goals of your opening exercise?  
Check all that apply.

☐ Creating a comfortable atmosphere
☐ Group building
☐ On-the-spot assessment
☐ Immediate learning involvement

Modify one of the icebreakers given in this chapter or create your own. Outline your “Great Beginning” below:

List materials and equipment needed to conduct the “Great Beginning” outlined above.
Chapter 6

Methods, Strategies, and Techniques

How do techniques differ from methods or strategies? What is the difference between methods and strategies? An instructional method is a way of presenting subject matter following specific steps. An instructional strategy is a specific procedure used to supplement a method. Instructional strategies are simpler than methods and require less time.

Instructional techniques are specific verbal or nonverbal actions taken by the trainer to assist with implementation of the method. Open-ended questions, giving directions, and complimenting good work are examples of verbal techniques, whereas examples of nonverbal techniques are smiling, moving toward a learner who is asking questions,
and remaining silent while learners contemplate a question.

Our focus will be training methods and strategies. Techniques that apply to a particular method or strategy will also be identified. There is not one “best” method or strategy, but each method or strategy is appropriate in some situations and not appropriate in others. However, methods and strategies chosen must be appropriate for teaching stated objectives.

When choosing an instructional method consider the following:

**Subject Matter**

The method you choose should simulate the real world environment where this training will be applied.

**Class Size**

Class size obviously affects the appropriateness of a given method.

**Time Limitation**

Time must be considered when selecting methods and strategies. Time limitations must be balanced against the value of active learning, since the
more actively involved the learners, the more time you will need. It is more time-consuming to generate class discussion than to simply lecture, and group work requires even more time. Small group work usually takes longer than having the learners independently complete the same task because a group must first agree on how to proceed. An even more time-consuming aspect of small group work is the time required for each group to report on its completed task or activity in the most effective way. Usually, letting learners practice enhances learning, but that requires additional time. Most hands-on tasks require supervised practice so that learners get the help they need.

**Space Limitation**

The space and room setup may influence the methods and strategies you select. Small group work may be limited by the requirement for additional space or even by the need for movable tables and chairs.

**Participants**

Method is selection is likely to be affected by the background participants already have on the subject.
Training Methods

Many instructional methods are intended for advanced-level training, but they can often be adapted for use when participants have little or no background experience related to the subject matter.

Case Study

A case study may be described as “a written demonstration.” A case study requires the participants to find a solution to the problem or problems presented in the case. The trainer introduces the case by providing an account of a real or fictitious situation, including sufficient details to make it possible for groups to analyze the problems involved. Participants are expected to identify significant facts and employ those facts in a strategy that leads to a workable solution to the problems presented. This requires participants to draw conclusions from the significant facts and make decisions based on those conclusions. Participants are to select the best alternative. The assigned case should appear to the participants to be a realistic situation. In conjunction with the case study, participants may be assigned independent research, or independent research may be required to isolate the significant facts pertinent to the case study. Participants must connect principles they have learned to the case. This method develops analytical skills and ties theory to practice.
Steps:

1. The trainer presents the case (usually in written form) and provides any supplementary information.
2. The trainer assigns relevant reading and/or research.
3. The trainer highlights key aspects of the case and explains the requirements for the assignment.
4. The participants meet in small groups to discuss the case and prepare a recommended solution.
5. Each group of participants presents its analysis and proposed solution.
6. All participants discuss each group’s proposed solution.
7. The trainer and participants summarize the findings and assess the various proposed solutions.

Finding a case study that illustrates exactly what is needed may be a daunting task. If you decide to write your own case study specifically geared to your training subject, here are some suggestions:

- Identify the issues, concepts, and principles you want the case study to emphasize.
- Brainstorm situations (real life or fictional) that illustrate the identified concepts and principles.
- Choose the situation that seems most promising and develop characters and events, background data, and actions taken.
Write a first draft of the case and ask someone to read it. The reader should do so without explanations, details, or justifications. The reader can provide feedback about the clarity and interest level of your proposed case study.

Using that feedback and your own critical analysis, rewrite the case study and develop discussion questions. Possibly add multi-media such as charts and photographs or include segments on audio or videotape.

You might also consider the value of having participants create their own case studies. Here are the steps:

1. Divide the class into groups of two or three. Instruct groups to develop a case study for the class to analyze and discuss.

2. Explain that the purpose of the case study is to learn about a topic by examining a concrete situation or example.

3. Suggest that the participants use either a real situation/example or an invented one for the case study. Make the material subtle and challenging; don’t be obvious about what’s right or wrong. Allow for different points of view.

4. Provide adequate time for groups to develop a short case situation or example that poses an issue to be discussed or a problem to be solved. Remind groups that case studies should be relevant.

5. Have the groups present their completed case studies to the class. Usually one
member of the group is chosen to lead the case study presentation.

Integrating an instructional technique, such as simple, short case studies, can be used to introduce participants to the application of concepts they have learned. Mini-case studies do not require extensive background on the part of the participants and can be used to teach a variety of subjects and concepts. Participants can work in small groups. Practicing with smaller cases enables participants to manage larger and more complex cases and to develop appropriate and more detailed solutions.

The case study method does have its limitations. Preparing case studies is time consuming because they address multiple higher-level learning objectives. Case studies often require participants to research background information. To maximize learning, sufficient time must be allotted for each group to prepare and present its analysis and for the entire group to discuss the case, the solution, and the approach used by the group to which the case study was assigned. Participants are often given supplementary reading material related to the issues involved. Supplemental reading may include policy memoranda, personnel handbooks, meeting minutes, and similar materials. Sometimes it is necessary for the trainer to create supplemental reading material.

To complement case studies consider incorporating one or more of the following methods:

- **Developmental conference** is a good way to examine key issues and critical assumptions in the case study.

- **Role-play** may be used to underscore the effect of subjective perceptions and interpersonal communications.
- **Study assignment** allows groups in-class time to work on the case or conduct independent research.

### Case Study

<table>
<thead>
<tr>
<th><strong>Advantages</strong></th>
<th><strong>Disadvantages</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>- Allows involvement and interaction</td>
<td>- Could produce “stereotyped” answers</td>
</tr>
<tr>
<td>- Close to reality, often a real life</td>
<td>- Requires time to analyze a report</td>
</tr>
<tr>
<td>- Strengthens analytical skills</td>
<td>- Complicated</td>
</tr>
<tr>
<td>- Allows participants to learn through discovery</td>
<td>- Students come to quick conclusions</td>
</tr>
<tr>
<td>- Enhances retention, recall and application of knowledge and skills</td>
<td>- May not identify the underlying problem</td>
</tr>
<tr>
<td></td>
<td>- Sometimes lengthy to read, thus disengages the reader</td>
</tr>
<tr>
<td></td>
<td>- Time consuming to prepare</td>
</tr>
<tr>
<td></td>
<td>- Background information is often needed by participants</td>
</tr>
</tbody>
</table>


Demonstration

Instead of just talking about a concept, procedure, or set of facts, demonstrate the information. The demonstration method allows participants to observe the task being performed. The steps can be explained as they are performed. Demonstrations may be live or videotaped. Demonstrations become an even better teaching tool when participants are actively involved, and can actually hear, see, and touch the learning materials. Demonstrations may be suited to the teaching of interpersonal skills such as interviewing or counseling as well as problem solving and hands on tasks.

Steps:

1. Trainer provides background information.
2. Trainer demonstrates the task or shows videotape of task.
3. Participants practice the task as the trainer observes them and gives feedback.
4. Once the trainer is assured that participants are performing the steps of the task correctly, participants practice independently.
Participants should be given immediate feedback on their progress as they practice. Walk around the room and give constructive comments on each learner’s performance. Reinforce correct performance with specific comments. Coach or demonstrate the correct steps if the learner is performing them incorrectly. Avoid lengthy practice sessions.

When the demonstration method is chosen keep in mind its two main limitations—class size and time. Class size may be a limiting factor for a hands-on demonstration because all participants must be able to work easily. Extra time may be needed to allow for setup and teardown of equipment.

Demonstrations may be enhanced by the use of one or more of the following complementary methods.

- **Lecture** or **instructional conference** can provide supplemental information.
- **Developmental conference** allows discussion of tasks that require interpersonal skills.
- **Role-play** permits practice of a task requiring strong communications skills.
- **Guided practice** permits practice at a group’s pace before individual practice.
- **Independent practice** provides for improvement in individual performance until the standard has been met or exceeded.
## Demonstration

<table>
<thead>
<tr>
<th>Advantages</th>
<th>Disadvantages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understanding skills</td>
<td>Trainer must be good “model”</td>
</tr>
<tr>
<td>Promotes visual interest</td>
<td>Large groups difficult</td>
</tr>
<tr>
<td>Step-by-step approach</td>
<td>Must be a simple process</td>
</tr>
<tr>
<td>May be live or videotaped</td>
<td>If you miss it there is no second chance (if it is live)</td>
</tr>
<tr>
<td>Visual instruction as well as auditory and possibly tactile</td>
<td>Takes a lot of time</td>
</tr>
<tr>
<td>Ability to involve participants</td>
<td>Set-up/tear down is time consuming</td>
</tr>
<tr>
<td>Hands-on experience</td>
<td>Pre-existing knowledge can spoil it</td>
</tr>
<tr>
<td>Interactive</td>
<td>Only a limited number of students can practice the demonstration</td>
</tr>
<tr>
<td>Small class size can make it very beneficial</td>
<td></td>
</tr>
<tr>
<td>No background information needed</td>
<td></td>
</tr>
</tbody>
</table>

- Demonstration advantages include understanding skills, promoting visual interest, a step-by-step approach, the ability to involve participants, hands-on experience, interactivity, and small class size making it very beneficial. No background information is needed.

- Demonstration disadvantages include the trainer needing to be a good “model,” large groups being difficult, the process needing to be simple, missing the demonstration being detrimental (if it is live), taking a lot of time, setup/tear down being time-consuming, pre-existing knowledge spoiling it, and only a limited number of students being able to practice the demonstration.
Developmental Conference

A developmental conference allows participants to learn from each other. It is a discussion where participants share experiences related to the subject at hand. Participants share ideas, opinions, and information. The trainer acts as a facilitator to insure that everyone has an opportunity to participate and share ideas thus participants learn from the experiences and ideas of others.

Steps:

1. The trainer asks thought-provoking open-ended questions related to the topic.
2. Participants answer the questions.
3. The trainer solicits feedback from participants, including comments, opinions, and experiences.
4. The trainer contributes ideas to the discussion only if it is apparent that the participants are not going to address them.
5. The trainer raises key questions related to the topic as necessary until the discussion reaches an appropriate stopping point.

The goal of this approach is for participants to maintain the learning environment via their discussion, while the trainer functions as a facilitator who raises a few open-ended questions to start the session.

Instructional techniques include everything the presenter does that contributes to the flow of the session from seating to sequencing. Seat participants in a circle or horseshoe so they can see each other. Be careful not to stifle learner participation. The
sequence of key points is not critical; it is more important that ideas are addressed at the time they are brought up and not postponed just to maintain pre-determined order. Record all ideas, not just those that seem most relevant or that were presented in the best manner.

Group size must be limited when using the developmental conference method; it works best for fifteen or fewer participants. The trainer must be able to facilitate a group discussion and keep it focused on the topic, soothe disagreements over differing opinions, deflect irrelevant points, and prevent lengthy elaborations after a point has been made. This method can be very inefficient, so the facilitator must balance the need for efficient use of time against the damage caused by limiting participation. Another limitation may be lack of background or experience that participants need to be able to make worthwhile contributions.

Trainers may enhance the developmental conference by integrating one or more of the following complementary methods and/or strategies:

- **Role-play** allows participants to practice interpersonal skills related to the topic.
- **Case studies** permit participants to practice problem solving or decision-making.
- **Incident process** provides practice of analytical skills needed for problem solving.
- **Critical incident** allows participants to learn from one another’s past experiences.
- **Buzz sessions** provide a forum to discuss specific aspects of the topic in small groups.
Brainstorming may be used to generate alternative ideas, procedures, or solutions to problems.

### Developmental Conference

<table>
<thead>
<tr>
<th>Advantages</th>
<th>Disadvantages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learn from each other</td>
<td>Staying focused is not possible at times</td>
</tr>
<tr>
<td>Trainer is a facilitator</td>
<td>Possible conflicts</td>
</tr>
<tr>
<td>(less stress, students at</td>
<td>Sharing is limited by lack of background knowledge</td>
</tr>
<tr>
<td>core)</td>
<td></td>
</tr>
<tr>
<td>Everyone can participate</td>
<td>Lack of interest without necessary background knowledge</td>
</tr>
<tr>
<td></td>
<td>Limited group size</td>
</tr>
</tbody>
</table>
Guided Practice

In the guided practice instructional method, the trainer guides the participants through a task by providing time for step-by-step practice. After participants watch the trainer demonstrate the first step, they immediately practice that step. Then the trainer demonstrates the second step and the participants practice it. Likewise, each subsequent step is demonstrated and practiced before moving on to the next step. This method allows the trainer to make sure that everyone is performing a given step correctly before moving on to the next. Guided practice is appropriate for teaching the use of computers and equipment, first aid tasks, physical fitness training, cooking, and completing standardized forms.

Steps:

1. The trainer explains and demonstrates how to perform the first step of the task.

2. Each learner practices the first step of the task.

3. The trainer insures that each learner has performed the first step correctly. The trainer may ask questions or move around the group to personally observe learner performance, and provides corrective feedback as necessary.

4. The trainer continues guiding the participants step-by-step until the task is completed.

Guided practice requires the trainer to continuously monitor the group to be certain that all
participants are performing each step correctly before moving on to the next one. Also, the trainer must assist individual participants on an as needed basis.

Equipment is one of the most limiting factors in using guided practice. Each participant must have the equipment and resources to work on the task. For example, a computer-based task requires participants to have computers. Another limiting factor is group size. The group must be small enough to allow the trainer to check each participant’s progress after each step of the task. Even in small groups, the trainer may need assistants to help monitor progress.

Learning through guided practice may be enhanced when supplemented with one or more of the following complementary methods and strategies.

- **Lecture** or **instructional conference** can be used to provide knowledge relevant to performing the task.

- **Demonstration** allows participants to observe the correct way to perform the task before they practice it.

- **Independent practice** gives participants the opportunity to reinforce learning by applying the concepts taught.

- **Sub-grouping** lets participants practice in small groups and assist each other via peer instruction.
Guided Practice

<table>
<thead>
<tr>
<th>Advantages</th>
<th>Disadvantages</th>
</tr>
</thead>
<tbody>
<tr>
<td>▪ Master skills one step at a time</td>
<td>▪ Everyone does not learn at the same pace or by the same method</td>
</tr>
<tr>
<td>▪ Identify errors during process or procedure</td>
<td>▪ Reluctant participants will not participate</td>
</tr>
<tr>
<td>▪ Group work</td>
<td>▪ All participants need equipment and resources</td>
</tr>
<tr>
<td>▪ Focuses time on new information</td>
<td>▪ Group size is limited to accommodate progress checks</td>
</tr>
<tr>
<td>▪ Strong technique for teaching tasks with many components</td>
<td></td>
</tr>
</tbody>
</table>

Guided Teaching

Guided teaching allows the trainer to build learning around the knowledge of the group via a series of questions, or to use questions to elicit hypotheses or conclusions. To enhance the effectiveness of this approach, record participants’ ideas and compare them to the main points of the presentation. The guided teaching method provides a change from lecture. It gives the trainer a chance to find out what participants already know and understand; this background knowledge can serve as the basis for teaching new information. Guided teaching utilizes the Socratic teaching technique, which encourages self-discovery.

Steps:

1. Pose a question or a series of questions that stimulate thinking. Ask open-ended questions, such as “How can intelligence be determined?”
2. Allow time for pairs or subgroups to consider their responses.

3. Record participants’ ideas. Categorize responses by presentation concepts.

4. Tie responses to the major points of the presentation. Give participants time to connect responses to new information.

<table>
<thead>
<tr>
<th>Guided Teaching</th>
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</thead>
<tbody>
<tr>
<td><strong>Advantages</strong></td>
</tr>
<tr>
<td>▪ Learner directed</td>
</tr>
<tr>
<td>▪ Instructor uses background knowledge and incorporates it into the learning</td>
</tr>
<tr>
<td>▪ Participants take “ownership” of the process</td>
</tr>
<tr>
<td>▪ Encourages self-discovery</td>
</tr>
</tbody>
</table>
Incident Process

The incident process method is used to teach decision making with an emphasis on asking the right questions. The objective is to obtain all necessary information via fact-finding questions. Participants are given a short synopsis of an actual incident with critical information deliberately omitted. After a specific amount of time to ask questions, participants must evaluate the situation to determine what other information they need to resolve the problem. To formulate good questions, participants analyze the situation to determine what additional information is needed. Since they must decide how to resolve the problems presented in the incident, they must gather information that leads them to a thorough analysis.

The trainer knows the history of the incident, but is careful to avoid volunteering more information than participants ask for in their questions. After the allotted time, participants decide what course of action to take. Additional learning results from a discussion about the effectiveness of their questions and the suitability of their recommendations. Finally, the trainer reveals the actual decision. Participants then analyze the effectiveness of their decision-making process in light of the real life solution.

Steps:

1. The trainer provides directions for the incident process method.
2. The trainer provides each participant a brief written description of the incident.
3. Participants ask questions to obtain the information they believe they need.
4. The trainer answers participants’ questions during the allotted time period. Fifteen minutes is usually long enough.

5. Working in small groups, participants draft a solution. Give a specified time for small groups to draft their solutions, usually 20 to 30 minutes. Check each group after about 15 minutes to see if you need to adjust the time limit so the group will be able to agree upon a solution.

6. Each group presents its recommended solutions.

7. The class discusses each recommended solution.

8. The trainer reveals what really happened when the incident occurred and how the problem was resolved. Any critical information the participants missed is revealed.

9. The participants assess their decision-making process.

Participants may propose workable solutions that differ from the actual solution. The trainer must be able to evaluate the alternative solutions. The trainer needs sufficient background and experience to visualize the probable outcome of each solution.

Consider integrating other methods into the presentation to enhance the use of the incident process method. Suggestions include the following:

- **Developmental conference** can be used to discuss proposed solutions.

- **Role-play** allows participants to consider the influence of subjective factors such as
perception and personal styles of communication.

- **Study assignment** may be used to stimulate participants to research information relevant to the incident.

- **Case study** is an appropriate way to practice separating essential from nonessential facts and to analyze the type of information needed for the decision-making process.

<table>
<thead>
<tr>
<th>Incident Process</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Advantages</strong></td>
</tr>
<tr>
<td>▪ Teaches problem solving</td>
</tr>
<tr>
<td>▪ Participants learn to formulate good questions</td>
</tr>
<tr>
<td>▪ Develops critical thinking skills</td>
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</tbody>
</table>
Independent Practice

Some skills can only be learned through extensive individual practice. Independent practice may take the form of written exercises that require participants to apply what they have learned in a new context or may involve repetition of hands-on practice. Skills requiring individual practice include keyboarding, reading directions, rehearsing a speech or practicing the pronunciation of words for a foreign language.

Steps:

1. Participants receive instruction on how to complete a task.
2. The trainer provides participants with necessary equipment or materials to practice the task.
3. The participants practice the task independently.
4. The trainer assists participants, giving specific feedback on an individual basis.

When planning independent practice sessions arrange them for the most efficient learning. Practicing one hour a day for five consecutive days is more effective than biweekly practice sessions of 2.5 hours each.

Independent practice used as a training method may be limited due to the need for additional trainers to supervise practice. Some tasks are complex and require constant trainer supervision. Some individuals may master a skill quickly and be ready to move on to other things. Other participants require additional practice. The trainer must be able to
accommodate variations in total practice time for each individual.

Methods to complement independent practice include:

- **Lecture or instructional conference** can be used to provide prerequisite knowledge related to task performance.
- **Peer coaching** may be used to provide additional practice and feedback.

### Independent Practice

<table>
<thead>
<tr>
<th>Advantages</th>
<th>Disadvantages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flexible</td>
<td>Isolation—no group interaction</td>
</tr>
<tr>
<td>Learner is responsible</td>
<td>Difficult to control</td>
</tr>
<tr>
<td>Learner can spend as much time as needed for learning</td>
<td>Limited feedback</td>
</tr>
<tr>
<td>Peer coaching</td>
<td>Limited progress checks</td>
</tr>
<tr>
<td>75% retention</td>
<td>Depends on learner’s motivation</td>
</tr>
<tr>
<td></td>
<td>Requires preliminary instruction</td>
</tr>
<tr>
<td></td>
<td>Undisciplined participants may not practice</td>
</tr>
<tr>
<td></td>
<td>Equipment availability</td>
</tr>
</tbody>
</table>
Information Search

The information search method gets participants involved through discovering and evaluating facts and information on their own or in small teams. The information search can be conducted in a resource center, library, online, or with books, artifacts, equipment, or other materials provided by the trainer. Each person or team is given a question or set of questions to research. Everyone or every team can be given the same questions and resources, or either questions or resources can vary. For example, one team might conduct an Internet search while another team researches the same questions using a set of reference books. In another variation, each team researches a different set of questions to obtain information that will contribute to solving a larger issue. The information search can also be designed as a competitive exercise. Involving students in the discovery of new information is an effective way to maintain interest.

Steps:

1. Create questions that can be answered by searching for information in available resource material. The resource material can include handouts, documents,
textbooks, reference guides, computer-accessed information, artifacts, or work-related equipment.

2. Distribute questions.

3. Participants search for information in small teams. Consider setting up a competition to encourage participation.

4. Review the answers as a class. Expand upon the answers to enlarge the scope of learning.

<table>
<thead>
<tr>
<th>Information Search</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Advantages</strong></td>
</tr>
<tr>
<td>Small groups</td>
</tr>
<tr>
<td>Discovery learning</td>
</tr>
<tr>
<td>Competitive</td>
</tr>
<tr>
<td>Mobility/options</td>
</tr>
<tr>
<td>Teaches research processes</td>
</tr>
<tr>
<td>Diversity of resources</td>
</tr>
</tbody>
</table>

**Instructional Conference**

An instructional conference uses mini-lectures interspersed with questions and discussion. The trainer lectures for five to ten minutes, and then pauses to allow participants to ask questions or dialogue. The trainer may also pose questions about the material just covered. The question-and-answer periods serve to break up the monotony of listening to the same person speaking all the time. It also
allows learning by requiring participants to express the new knowledge in their own words during discussion. Planned feedback and comprehension checks can be easily and effectively integrated into this instructional method. This is extremely appropriate for participants who have no background knowledge or experience in the subject.

Steps:

1. The trainer lectures for five to ten minutes.
2. The trainer offers participants the opportunity to ask questions or make comments.
3. The trainer asks effective questions related to the content of the mini-lecture.
4. Participants discuss the questions.
5. The first four steps are repeated until the presentation is completed.
6. The participants summarize, and the trainer provides closing remarks.

Instructional conferencing requires a lot of preparation. The trainer must determine logical breaking points for questions and prepare effective questions ahead of time. Questions must stimulate participant interest. This can be difficult with introductory-level material.

Consider using the following complementary methods and strategies to enhance instructional conferences:

- During the training session use independent practice to allow participants to apply concepts taught in the lecture and to reinforce learning.
➢ Ask participants to complete a study assignment prior to the training session so they enter the lecture with some background knowledge and a frame of reference to put new concepts into context.

➢ Sub-grouping allows participants to practice the application of new learning in small groups.

➢ Buzz sessions permit participants to discuss an aspect of the subject in small groups.

➢ Brainstorming lets participants generate unrestricted ideas related to key points or questions.

➢ Educational games can be used to illustrate concepts or review key points.

<table>
<thead>
<tr>
<th>Instructional Conference</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Advantages</strong></td>
</tr>
<tr>
<td>▪ Flexible</td>
</tr>
<tr>
<td>▪ Enhances questioning skills</td>
</tr>
<tr>
<td>▪ Active engagement</td>
</tr>
</tbody>
</table>

Chapter 6: Methods, Strategies, and Techniques
Lecture

A lecture is a prepared talk to present information. Learning is passive. Participants are not required to participate in any way. Participants merely listen while the trainer speaks. The lecturer must inspire participant attentiveness by incorporating stories, humor, voice inflection, and perfect timing.

Steps:

1. The trainer introduces the subject.
2. The trainer presents the information.
3. The trainer summarizes the material and concludes with a closing statement emphasizing the importance of the subject.

Lecture is the least effective of all information presentation methods. Tired and pre-occupied participants become lost even with well presented lectures. There is no feedback or interaction. The trainer does not know the extent of the participants’ comprehension of the material. The participants do not know if their interpretation is correct.

While a carefully planned and well-delivered lecture can be an effective training method, using this method often leads to boredom, lack of involvement, and limited learning. Therefore, alternative methods are usually preferred, or, at least, used to reinforce new information. Consider the following methods and strategies to reinforce lectures:

- Ask participants to complete a **study assignment** prior to the training session so
they enter the lecture with some background knowledge and a frame of reference to put concepts into context. Having supplied the study assignment, the trainer can reference it as the lecture progresses.

- During the training session use **independent practice** to allow participants to apply concepts taught in the lecture and to reinforce learning.

- **Buzz sessions** permit participants to discuss the subject in pairs or small groups before sharing.

- **Sub-grouping** allows participants to practice the application of new learning in small groups.

- **Brainstorming** in large groups lets participants generate ideas related to key points or questions.

- **Educational games** may be used to illustrate concepts or review key points.
<table>
<thead>
<tr>
<th>Lecture</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Advantages</strong></td>
<td><strong>Disadvantages</strong></td>
</tr>
<tr>
<td>- Set format</td>
<td>- Passive learning</td>
</tr>
<tr>
<td>- Preplanned</td>
<td>- No questions/feedback</td>
</tr>
<tr>
<td>- Covers a lot of material</td>
<td>- No use of participant experience</td>
</tr>
<tr>
<td>- Can be used with large numbers</td>
<td>- Cannot progressively evaluate</td>
</tr>
<tr>
<td>- No interruptions</td>
<td>- Must be stimulating to hold participants’ interest</td>
</tr>
<tr>
<td>- Complete control over content</td>
<td>- Tired or preoccupied participants lose interest</td>
</tr>
<tr>
<td></td>
<td>- Facilitator does not know if the participants comprehend information</td>
</tr>
<tr>
<td></td>
<td>- Participants do not know if they are interpreting the information correctly</td>
</tr>
<tr>
<td></td>
<td>- Limited involvement from audience</td>
</tr>
</tbody>
</table>
Peer Coaching

Peer coaching involves dividing participants into pairs. Within each pair, they take turns coaching and practicing a task. The participant serving as the coach gives feedback to the person practicing. The trainer observes the activity and provides feedback as necessary. This method is appropriate for both hands-on tasks such as using a computer and tasks that require interpersonal skills such as conducting an interview. Peer coaching allows the more experienced participant to demonstrate and then coach. Ideally, all participants have sufficient expertise both for the roles of coach and student.

Steps:

1. The trainer describes how to utilize this method.
2. Participants select a partner, or partners may be assigned.
3. The peer coach watches the participant perform the task.
4. The peer coach gives specific feedback to the participant.
5. The trainer monitors the pairs and makes suggestions as appropriate.
6. Participants reverse roles.
7. When appropriate, the participant practices the task or a portion of it again, incorporating feedback received from the peer coach.
8. The trainer observes interaction and provides additional assistance as necessary.
Since the trainer focuses on one pair at a time, there must be a reasonable expectation that the coaches in other pairs are able to distinguish correct procedures. The peer coaching method may be enhanced by integration of one or more of the following complementary methods:

- This method is often preceded by lecture or instructional conference to provide background knowledge.
- Demonstration of correct procedures may also precede the peer coaching instructional method.
- Role-play may be integrated for practicing interpersonal skills that are part of the task.

### Peer Coaching

<table>
<thead>
<tr>
<th>Advantages</th>
<th>Disadvantages</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Reduce peer intimidation</td>
<td>- Facilitators need to monitor pairs</td>
</tr>
<tr>
<td>- Allows facilitator to circulate</td>
<td>- Lose time waiting for feedback</td>
</tr>
<tr>
<td>- Permits use of multi-level groups</td>
<td>- Keeping on task</td>
</tr>
<tr>
<td>- Builds confidence</td>
<td></td>
</tr>
<tr>
<td>- Immediate positive feedback</td>
<td></td>
</tr>
<tr>
<td>- When teaching, participants learn more</td>
<td></td>
</tr>
</tbody>
</table>
Role-Play

Role-plays are used to practice new behaviors for handling situations and to increase sensitivity to interpersonal issues. Role-plays require participants to act out commonly encountered real-world situations. After a likely scenario is described, selected participants become actors as they play their assigned roles. In most learning environments, there will not be roles for everyone, so other participants observe. Discussion should immediately follow a role-play while it is fresh in the participants’ minds. Immediate reflection allows for the most constructive commentary regarding observations.

The participants in a role-play can be asked to play themselves or others. When players attempt to speak, think, and behave like someone else, they learn to identify with others’ perspectives and problems and are more tolerant of others’ attitudes and opinions. Playing oneself can help a person be more prepared for, and hence more comfortable in, situations that he or she is likely to encounter.

Role-plays can be adapted to groups of various sizes. All participants in a small group can participate and the role-play can be conducted in front of the large group. The same scenario can be replayed to allow participants to observe and evaluate different approaches. Participants’ suggestions may be the
basis for adjustment of the scenario to explore varied situations and experiment with different approaches.

Steps:

1. The trainer presents the role-play scenario.
2. The trainer asks for volunteers to play the roles or assigns roles for specific educational reasons.
3. The trainer may request the observers to portray or avoid specific behaviors or reactions.
4. The role players act out the scenario.
5. The trainer stops the role-play at an appropriate point. Role-plays can lose their effect if allowed to continue too long.
6. The group analyzes the role-play. Stimulate participants to form opinions and insights by asking probing questions. Examples include: What happened? How accurately did you predict the reactions of others? How might you have approached this situation? What might have been a more effective approach? What did you learn from this role-play?

When deciding to use the role-play method, consider its limitations. Some participants may feel uncomfortable with role-plays and thus be reluctant to participate. Participants need some background related to the roles they are playing or be allocated time to prepare. Role-play situations that are likely to evoke intense emotions are not appropriate for training.

Role-plays may be enhanced when complemented with one of the following methods:
➢ **Lecture or instructional conference** can be used to provide knowledge necessary for participants to assume their roles.

➢ **Demonstration** can be used to display alternative approaches to the role-play situation.

➢ **Case study** can be used for a discussion of decision making as related to the role-play situation.

➢ **Peer coaching** permits participants to practice interpersonal communications or human-relations skills as they relate to dealing with difficult situations or dealing with people who make situations difficult.

### Role-Play

<table>
<thead>
<tr>
<th>Advantages</th>
<th>Disadvantages</th>
</tr>
</thead>
<tbody>
<tr>
<td>▪ Immediate feedback following role play</td>
<td>▪ Too few roles for everyone</td>
</tr>
<tr>
<td>▪ Ability to identify with the perspectives and problems of others</td>
<td>▪ Uncomfortable acting</td>
</tr>
<tr>
<td>▪ Become more tolerant of differing attitudes and opinions</td>
<td>▪ Reluctance to participate</td>
</tr>
<tr>
<td>▪ Adaptable to various group sizes</td>
<td>▪ Can lose effect if drawn out</td>
</tr>
<tr>
<td>▪ Replay same scenario to allow participants to observe and evaluate</td>
<td>▪ May evoke intense emotions</td>
</tr>
<tr>
<td>different approaches</td>
<td></td>
</tr>
</tbody>
</table>

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**Team Practice**

In the team practice instructional method, participants practice a collective task that can only be accomplished by a group of people. Some examples of collective tasks are project based learning activities and role plays. In team practice, not everyone has the same assignment; therefore different specialties must be monitored and coordinated.

Steps:

1. Participants are formed into teams and given a project.
2. Each team member is responsible for his or her particular assignment but must coordinate and cooperate with other team members.
3. When teams complete their project, they assess their performance by discussing how they made decisions, how they coordinated with one another, and what was learned from the experience. The trainer may add additional observations.

When the learning objective of the team’s assignment emphasizes decision-making or problem-solving skills, the team should be allowed to work independently. The trainer should stay in the background but be available as a resource when needed. When the learning objective emphasizes performance, the trainer may need to provide frequent direction.

Time is often a limiting factor when using the team practice method. There is seldom enough time
for participants to reach the desired mastery level, especially when it is desirable for them to perform more than one function within the collective task. Participants may not get to practice every function they are asked to perform.

Consider the following methods to complement team practice:

- **Lecture** or **instructional conference** is appropriate to provide important background information, particularly with regard to the overall objectives of the team effort.

- **Demonstration** is often an effective technique for illustrating specific skills.

- When interpersonal skills are an important element of the team effort, they can be enhanced through **role-play**.

- **Independent practice** and/or **peer coaching** are usually required to allow team members to practice individual assignments.

<table>
<thead>
<tr>
<th>Team Practice</th>
<th>Advantages</th>
<th>Disadvantages</th>
</tr>
</thead>
</table>
|               | • Similar to real-life learning  
|               | • Builds team work  
|               | • Builds leadership skills  
|               | • Compromise  
|               | • Social ability | • Some team members may not do their share of the work  
|               | | • Members only learn one part of assignment  
|               | | • Time limitations  
|               | | • Participants may not get to practice every function they may be asked to perform |
Training Strategies

Training strategies are techniques that are used in conjunction with training methods to enhance effectiveness. Strategies are never used as a substitute for methods; their value is limited to serving as complementary techniques. Training strategies are used to enhance learner interest or participation. They provide a means of utilizing the participants’ collective knowledge. Training strategies are used for short periods of time and are embedded within the overall training method.

Brainstorming

Brainstorming is a strategy that should be considered when the goal is to generate as many ideas as possible. Brainstorming begins with recording ideas in a given length of time. No idea is eliminated or evaluated during the initial brainstorming. For best results, use the following three phases when brainstorming: list ideas, categorize and evaluate ideas, and then share ideas.

In phase one participants form subgroups. One person in each group acts as the recorder. Subgroups are given about five minutes to generate ideas. They are instructed to list ideas without discussing their merits. The recorder records all ideas on a flip chart, or in a similar method, for all to see. Even duplicate ideas are recorded, or check marks are used to indicate ideas that were presented more than once. When time is called, each subgroup begins phase two.

In phase two, subgroups discuss, categorize, and evaluate the ideas they generated in phase one. Subgroups trim their list by eliminating the ideas they decide not to present. The product of phase two is a list of ideas the group believes to be their best.
In phase three each subgroup presents that refined list of ideas to the larger group.

Steps:

1. Subgroups of participants are formed, and one member of each subgroup serves as the recorder.

2. Emphasize that the brainstorming will be conducted in three phases: listing ideas, categorizing and evaluating ideas, and sharing ideas with the large group.

3. Explain that in the first phase no comments or evaluations are allowed—ALL ideas are recorded on the flip chart, even if the same idea is repeated. This procedure ensures the flow of ideas.

4. Remind participants that the goal of phase one is the generation of as many ideas as possible. Call time after five minutes.

5. Explain that the goal of phase two is categorizing and evaluating the ideas generated during phase one. During phase two, the recorder prepares a new listing of ideas the group believes to be the best.

6. During phase three each subgroup presents their list of ideas to the entire class.

Consider providing participants with a list of “Brainstorming Rules.” Handouts, transparencies, or wall charts could be used. Rules to consider include:

- Every idea is important.
- Each person shares one idea at a time.
- Each idea has value and potential.
- Criticism and evaluation of ideas are not permitted during phase one.
- Wild and unconventional approaches are perfectly acceptable.
- Quantity of ideas is the goal.

<table>
<thead>
<tr>
<th>Brainstorming</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Advantages</strong></td>
<td><strong>Disadvantages</strong></td>
</tr>
<tr>
<td>- Breaks down inhibitions</td>
<td>- Requires leadership of process</td>
</tr>
<tr>
<td>- Creative and stimulating</td>
<td>- Possibility of few quality ideas</td>
</tr>
<tr>
<td>- Quantity of ideas; no idea is a bad idea</td>
<td>- Little trainer input for content</td>
</tr>
<tr>
<td>- Non-threatening</td>
<td></td>
</tr>
<tr>
<td>- Fun</td>
<td></td>
</tr>
</tbody>
</table>
Buzz Session

A buzz session does not attempt to complete an assignment or solve a problem; rather the purpose is to stimulate thought. To begin a buzz session, participants form small groups. Each group briefly discusses the assigned topic. Generally, buzz sessions are relatively short because their function is to stimulate participants to think critically about the topic. Upon completing the buzz session, the trainer leads a class discussion to summarize the dialogue and provides a transition to the larger training method.

Steps:

1. Explain the purpose of the buzz session.
2. Allow five to ten minutes for participants to talk about the topic.
3. Lead a discussion with the large group.

If buzz sessions are used more than a few times, change the composition of the groups to allow participants the opportunity to become better acquainted with each other and allow them to be exposed to a variety of perspectives. Unbalanced participation may result from some participants dominating the interactions. In other words, some participants may not get to contribute because others contribute too much.
**Buzz Session**

<table>
<thead>
<tr>
<th>Advantages</th>
<th>Disadvantages</th>
</tr>
</thead>
<tbody>
<tr>
<td>High involvement</td>
<td>Possible lack of depth</td>
</tr>
<tr>
<td>Non-threatening</td>
<td>Can lose direction if not monitored</td>
</tr>
<tr>
<td>Enjoyable</td>
<td>Some participants may monopolize the discussion</td>
</tr>
<tr>
<td>Feedback to trainer</td>
<td></td>
</tr>
<tr>
<td>Many ideas quickly</td>
<td></td>
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</tbody>
</table>

**Critical Incident**

In the critical incident strategy, participants share experiences that relate to the topic being discussed. The shared experience should provide an important learning opportunity for others. Experiences suitable for sharing are not limited to positive experiences. Negative experiences can also be significant learning experiences. Obviously, this strategy is appropriate only when all, or at least most, participants have had real-world experiences related to the training topic. This strategy is almost never appropriate for introductory content.

**Steps:**

1. Explain the critical incident strategy. Emphasize that negative as well as positive experiences can provide valuable learning opportunities.

2. Ask participants to respond to an open ended statement such as, “From your experience as an Adult Basic Skills instructor, describe an incident from which you learned a great deal.”
3. Allow time for participants to reflect on the critical incident.

There are two major limitations in using the critical incident strategy. The group size is limited by the time available for each participant to share. With larger groups a limited number of participants may report, but this risks negative reactions from participants not selected. The other major limitation is a lack of group members who have real world experience to share learning opportunities.

<table>
<thead>
<tr>
<th><strong>Critical Incident</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Advantages</strong></td>
</tr>
<tr>
<td>▪ Opportunity to involve all participants</td>
</tr>
<tr>
<td>▪ Personal experience can bring new ideas or challenges to the group</td>
</tr>
</tbody>
</table>

**Educational Games**

Educational games may take the format of a popular board game, a television game, or may have
a unique design. Games can be as simple as recalling information or as elaborate as simulations.

The easiest way to create games is to mimic commercial formats, such as Monopoly. Many well-known games can be easily adapted for training by changing the knowledge required for successful play. One popular format is the jigsaw puzzle; participants are given “pieces” to put together to complete a picture or solve a problem. In addition to teaching problem-solving skills, this game demonstrates the importance of sharing information. When time or resources do not permit the design of a unique game, look for a commercially produced educational game that is relevant to the content area. Examples of appropriate goals for using this strategy include team building, diversity training, leadership, and interpersonal communications.

Steps:


2. Develop the game.

3. Provide clear directions. Put the directions in writing unless they are extremely simple.

4. Based on the game design, decide how it will be used in training. Will the whole group play together? Will the group need to be split into smaller teams? Will contestants be selected to participate like on a television game show?
5. Reconvene as a class to reflect on the experience.

### Educational Games

<table>
<thead>
<tr>
<th>Advantages</th>
<th>Disadvantages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increases understanding of principles</td>
<td>“Lazy” participants</td>
</tr>
<tr>
<td>High involvement</td>
<td>May be viewed as “childish”</td>
</tr>
<tr>
<td>Fun, interesting way to teach</td>
<td>Possibility for too much competitiveness</td>
</tr>
<tr>
<td>Interactive</td>
<td>Time requirement for setup</td>
</tr>
<tr>
<td>Ability to use with large group</td>
<td>May lead to loss of facilitator control</td>
</tr>
<tr>
<td>Games often involve problem solving strategies</td>
<td></td>
</tr>
<tr>
<td>Improves retention</td>
<td></td>
</tr>
</tbody>
</table>

- Increases understanding of principles
- High involvement
- Fun, interesting way to teach
- Interactive
- Ability to use with large group
- Games often involve problem solving strategies
- Improves retention
Jigsaw Learning

The jigsaw learning strategy involves participants in primary and secondary groups. Groups of equal numbers are given assignments. After a set time limit, group members move to a different subgroup to present their original assignment. A major advantage of jigsaw learning is the expectation that each participant is active in the learning process. This alternative is especially valuable when topics can be segmented or “chunked” into non-sequential segments. Participants learn as well as teach one another. Knowledge is combined to form a coherent body of information.

Steps:

1. Choose learning material that can be separated into parts of approximately equal importance and difficulty. The segments can be as short as one sentence or as long as several pages. Examples include multipoint handouts, text with different sections or subheadings, lists of definitions, or groups of magazine length articles.

2. Divide participants into the number of groups corresponding to the number of
learning segments. Give one assignment to each group of participants. Ask each group to read, discuss, and learn the material.

3. After the study period, form jigsaw-subgroups. Each subgroup should contain representatives from every study group.

4. Members of the jigsaw group teach each other their new information. An alternative is to give each group a set of questions that depend on the varied knowledge of its members.

5. Reconvene the large group to review each conclusion and address any remaining questions.

### Jigsaw Learning

<table>
<thead>
<tr>
<th>Advantages</th>
<th>Disadvantages</th>
</tr>
</thead>
<tbody>
<tr>
<td>▪ Each participant contributes</td>
<td>▪ One person can prevent a group from completing its task</td>
</tr>
<tr>
<td>▪ Each participant learns and teaches</td>
<td>▪ Requires much planning</td>
</tr>
<tr>
<td>▪ A coherent body of information is formed</td>
<td></td>
</tr>
<tr>
<td>▪ Creates interdependence among group members</td>
<td></td>
</tr>
<tr>
<td>▪ Synergetic learning</td>
<td></td>
</tr>
</tbody>
</table>
Panel Discussion

In a panel discussion, three to six participants take turns making brief presentations about a discussion topic. One approach involves dividing the topic into parts and letting each panel member discuss a subtopic. Another option is for each learner to approach the common topic from a different point of view. After panel members have completed their presentations, they respond to questions and comments from the audience. A third variation of the panel discussion is debate. A debate format requires a moderator who gives each point of view equal time.

Steps:

1. The trainer meets with panelists to assist them in preparing their presentation. The trainer must be sure all panelists are fully prepared to present the material thoroughly and accurately.

2. All panelists present their material before questions are taken from the audience.

3. After all panelists have completed their presentation, the question-and-answer session begins.
Panel Discussion

<table>
<thead>
<tr>
<th>Advantages</th>
<th>Disadvantages</th>
</tr>
</thead>
<tbody>
<tr>
<td>▪ Topic can be divided into parts allowing each panel member to discuss a separate piece</td>
<td></td>
</tr>
<tr>
<td>▪ Topic can be looked at from different points of view</td>
<td></td>
</tr>
<tr>
<td>▪ Opportunity for debate</td>
<td></td>
</tr>
<tr>
<td>▪ Multi-level interaction</td>
<td></td>
</tr>
<tr>
<td>▪ Stimulates thinking</td>
<td></td>
</tr>
<tr>
<td>▪ Allows participants to share knowledge and experiences</td>
<td></td>
</tr>
<tr>
<td>▪ Trainer must be sure all panelists are fully prepared to present the information thoroughly and accurately</td>
<td></td>
</tr>
<tr>
<td>▪ No guarantee that all participants will participate</td>
<td></td>
</tr>
<tr>
<td>▪ Time consuming</td>
<td></td>
</tr>
</tbody>
</table>

Subgrouping

Subgrouping divides larger groups into a group size that is appropriate for the type of collaboration and interaction desirable to complete a particular assignment. Usually the subgroups consist of four to six people, however desirable subgroup size can be affected by the nature of the task. There are two ways in which subgroups can work toward the common goal. To generate as many ideas or perspectives as possible, each subgroup tackles the same problem using similar approaches. However, each subgroup may work on a different aspect of the larger problem or complete different tasks related to the learning objective. Dividing the problem into parts allows more details to be analyzed and resolved within a given time frame. At the end of the allotted time period, each subgroup presents its findings to the large group.
Subgrouping allows all members of the large group to actively participate in an analysis or problem solving exercise. Collaborative learning occurs within the subgroups. Questions may be asked and clarified that shy or passive participants would never have asked during a large group session.

Socialization occurs within subgroups. Participants become at ease with each other, thus contributing to a more relaxed environment. If subgrouping is used more than a few times, change the composition so participants have the opportunity to interact with more people and be exposed to a variety of perspectives.

Even within small subgroups, participation may be unbalanced. Some participants may dominate the interactions while others may be more reticent. Some participants may not contribute because others contribute too much.
Steps:

1. Explain the assignment. Put lengthy instructions in writing.

2. Inform the groups of how much time they have to work. Remind participants that each subgroup will report its findings to the entire group and suggest that they may wish to take notes as they work.

3. Inform the groups of how much time they have to report their findings.

<table>
<thead>
<tr>
<th>Subgrouping</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Advantages</strong></td>
</tr>
<tr>
<td>▪ Each subgroup can work on a different part of the larger task</td>
</tr>
<tr>
<td>▪ Allows for more details to be analyzed and resolved within a given time frame</td>
</tr>
<tr>
<td>▪ Creates opportunities for all members of a large group to actively participate in an analysis or problem solving exercise</td>
</tr>
<tr>
<td>▪ Collaborative learning</td>
</tr>
</tbody>
</table>
Summary

One of the most important decisions you will make when planning a training workshop is the selection of instructional methods and their related strategies and techniques. The selection affects learner interest and participation, the amount of time needed to present a given topic, and possibly determines whether the learning objectives are met. When selecting instructional methods, strategies and techniques always consider the training topic, group size, resources, and participants’ backgrounds. A mismatch with any one of these factors can cause the training to be ineffective. One of the most important principles of training is active participant involvement. Remember, the treasure of learning is the joy of discovery!
Checklist 6: Methods, Strategies, and Techniques

Step 1: Generate a broad outline of all methods, strategies, and techniques necessary to meet each objective of your training plan.

☐ Methods ________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

☐ Strategies ________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

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________________________________________________________________________

☐ Techniques ________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
Step 2: Sequence training methods, strategies and techniques. Consider which will be better for the beginning, middle, and end of your training. Adjust activities to improve flow.

Step 3: Begin work on the details. How will you conduct each activity? Decide on timing, introductory remarks, key points and instructions, and ways to end.

Step 4: Review and revise. Mentally rehearse the overall design as the trainer and as a participant. Revise any details so that each activity complements the ones that precede and/or follow it.
Chapter 7

Meeting Individual Learning Styles

Confucius was a very wise man who lived in ancient China over 2000 years ago. His wisdom and insightfulness are illustrated by the following quote.

“What I hear, I forget.
What I see, I remember.
What I do, I understand.”

Adults generally learn best by doing. Mel Silberman, who wrote Active Training: A Handbook of Techniques, Designs, Case Examples and Tips, rewrote Confucius’ wisdom into a “Credo for Active Learning” to reflect how adults learn.
When I hear, I forget.
When I hear and see, I remember a little.
When I hear, see, and ask questions or discuss with someone else,
I begin to understand.
When I hear, see, discuss, and do,
I acquire knowledge and skill.
When I teach to another, I master.
(Silberman, 1998, p. 2)

Silberman has estimated the average retention rates from various methods of instruction to be:

<table>
<thead>
<tr>
<th>Method</th>
<th>Retention Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lecture</td>
<td>5 percent</td>
</tr>
<tr>
<td>Reading</td>
<td>10 percent</td>
</tr>
<tr>
<td>Audiovisuals</td>
<td>20 percent</td>
</tr>
<tr>
<td>Demonstration</td>
<td>30 percent</td>
</tr>
<tr>
<td>Discussion</td>
<td>50 percent</td>
</tr>
<tr>
<td>Practice by doing</td>
<td>75 percent</td>
</tr>
<tr>
<td>Teaching others</td>
<td>90 percent</td>
</tr>
</tbody>
</table>

**Presentation Style**

Did you realize that we only remember about half of what we hear? Does this surprise you? Are you surprised we remember that much? Think of how often you cannot remember what someone told you yesterday, or every grocery item someone just requested over the phone.

Adults cannot recall everything they hear because most do not practice recall very often. However, even if people do practice, they cannot “build a framework” as fast as others talk. Try listening to a computer enthusiast tell you the five steps for completing a computer task, then complete
that task yourself. Try listening to directions in a strange town, then following them to reach a specific destination. For many people, the key to remembering is writing information down.

The previous paragraph may have led you to realize that remembering and following directions is easier when you are in “familiar territory.” People with computer experience will better remember oral directions because they visualize each step. That is also why you are better able to follow driving directions for a familiar area than for new territory. Because they are familiar with the contexts of their presentations, what seems simple to the presenters may be complex to participants who have not yet built a framework. Remember that at least some participants in your workshop are probably entering new territory.

Suppose you slow the presentation to a speed that gives participants time to “build a framework” and “color in the background” so they can better visualize the message. What would happen to those participants who have enough background to be in “familiar territory?”

Research has shown that most of us think at the rate of at least 500 words per minute. Most speakers talk at only 100 words per minute. If workshop participants do not need to invent 400 words a minute for framework building, they will probably spend 400 words per minute thinking about dinner plans, social activities, or personal problems (Silberman, 1998).
One study shows that participants in lecture-based learning are inattentive approximately 40 percent of the time (Pallio, 1984). Participants may try to focus at the beginning of the lecture, but they have to work at it. As they tire, their minds wander. So one of the problems generated by sustained lecturing is a decrease in audience attention. Lecture makes the assumption that all learners need the same information and need it at the same pace. It also assumes that everyone processes verbal information at the same pace; we know that is not true. Some people are good auditory processors, some are not as good, and some have undiagnosed auditory processing problems (Johnson, Johnson, and Smith, 1991).

Master trainer Bob Pike recommends that participants be given a chance every eight minutes to internalize what they have been hearing before it is simply supplanted by the next wave of information. Pike also points out that adding visuals to a presentation results in 14 to 38 percent improvement in retention (Pike, 1994). The saying, “A picture is worth a thousand words” may not be true, but a picture is several times more effective than words alone (Silberman, 1998). Using visuals can reduce the length of a lecture. A good rule to remember when lecturing is “shorter is better.”
One of the least effective ways to involve participants is to just stand behind a lectern and talk to them. Adults do not respond well to lecture because it relies so heavily on only one of the senses. Use flip charts, tapes, demonstrations, etc. to actively involve participants. Discussions are valuable training aids because, done properly, they give the participants an opportunity to verbalize their understanding of the material. They also give the trainer the opportunity to determine if the participants are “catching on.”

Changing Learning Styles

Develop workshop presentation techniques suited to alternative learning styles. According to research, preferred learning styles are changing. Research results from 1978 to 1983 indicate that approximately 60 percent of entering college students have a practical rather than theoretical orientation to learning. High school students by a ratio of 5:1 prefer learning activities that are “concrete and active” to activities that are “abstract and reflective.” Based on this research, Schroeder concludes, “Active modes of teaching and learning create the best match for today’s adults” (1993, p. 25).

In many training sessions, particularly in Adult Basic Skills, the trainer is faced with teaching a mix of participants ranging from new instructors to seasoned veterans. Obviously, not all participants benefit equally from the same presentation style.
Taking Risks

The need to feel secure has to be met before the need to reach out, take risks, and explore new areas can be entertained. Growth takes place in little steps, according to Maslow, and “each step forward is made possible by the feeling of being safe, of operating out into the unknown from a safe home port” (1968, p. 45).

People feel safe and secure when they “connect” to others and sense that they belong. This feeling of belonging, supported through group work, gives participants the confidence to face new challenges. The emotional and intellectual support that comes from learning with others allows participants to go beyond their present level of knowledge and skill.

Jerome Bruner recognizes the social side of learning in his classic book, *Toward a Theory of Instruction*. He describes a “deep human need to respond to others and to operate jointly with them toward an objective” (1966, p. 67). Maslow’s and Bruner’s concepts underlie the development of the small-group learning methods used in training. Placing participants in teams and giving them tasks in which they depend upon each other to complete the work are effective ways to capitalize on their social needs. Involved participants learn with their peers. They have the need to talk with others about their experiences, which leads to further connections. Remember that what participants discuss with others, and, more importantly, what they teach others, will be the most thoroughly learned. This is how they acquire understanding and master learning (Silberman, 1998). Giving diverse assignments to different participants accomplishes at least two things; it prompts them to learn together and it allows
them to teach each other. Recall that we learn the most when we teach.

Experienced educators know how critical it can be to teach at a level appropriate to individual learners. This is equally true of workshops; however, it is often more difficult to evaluate the prior background and level of understanding of prospective workshop participants. It is not an easy task. Trainers should invest a significant amount of time into meeting learner needs since it is so important to the workshop’s success. Since workshop participants’ backgrounds and interests vary significantly, trainers should consider both when planning.

Just as planning is the most critical phase of the workshop, defining the target group is the most critical phase of the planning process. If participants are expected to have limited background knowledge, then more time should be devoted to “setting the stage.” Carefully evaluating the target group helps the workshop facilitator to anticipate background deficiencies and be prepared to make adjustments that enhance workshop effectiveness.

People feel safe and secure when they “connect” to others and sense that they belong.
Choosing Activities

Variety is the most important consideration when choosing activities. There are two reasons for choosing a variety of activities. First, variety maintains the participants’ interest for a longer period of time. Secondly, participant learning styles differ. Using a variety of activities increases the chances for everyone to benefit. To keep everyone alert and attentive, organize the workshop so participants experience sessions differently. Similar benefits accrue from providing variety within each session.

It is also important to select activities that fit the interests and abilities, as well as the level of maturity, of the participants. Activities must be appropriate for concepts and objectives being taught. Do not do activities simply for the sake of doing an activity. Participants should never leave a workshop questioning why they played an irrelevant game rather than learning more about the concepts presented in the workshop.

The presenters must be reasonably comfortable with the activities chosen, but good presenters will want to try new ideas if they seem best suited to achieving goals and objectives. Time and cost can limit the types of activities used, but those considerations should have been made during the workshop planning process. Remember that more learning occurs if participants are actively involved. Plan the workshop so there will be time for appropriate participatory learning activities such as role-play, structured exercises, and appropriate games. Also, consider using films or demonstrations that model desired behaviors.

The participatory workshop model goes beyond normal workshop lectures and group discussions. Activities such as brainstorming, case
studies, demonstrations, role-playing, and simulations are part of the participatory workshop model. These types of activities provide practice and feedback, increase motivation to further explore a topic, and create a sense of ownership, relevancy, and success. Consider the feasibility and potential value of such activities for enhancing the effectiveness of your workshop.

Use activities that are easily adapted for classroom use. Participants expect to learn things they can use in their own classrooms. The most valuable workshops offer opportunities to learn and practice concrete ideas and apply techniques.

Consider the comfort level of participants. It is a rare group that does not include introverts who cringe at being “on stage.” Also remember that some participants may have physical conditions such as arthritis or obesity that make many activities uncomfortable, difficult, or embarrassing. If you chose activities that can be conducted without putting participants “on the spot,” you can expect participatory workshops to result in high evaluations and maximum learning. However, if the activities “turn off” some participants, they may view the entire workshop and its topics negatively.
Balancing Listening and Talking

Most participants feel they have something worthwhile to say, and would like to have the opportunity to express their views. Interacting with others is usually stimulating; it helps participants to internalize information and creates alertness. In addition, participants tend to contribute more to particular ideas when they are encouraged to express their own views. Since the interactive mode has potentially high value, it may be desirable to divide large groups into smaller groups to allow for more participation.

It is also important to allow time for, and encourage, interaction. People want to be heard. Give respondents the last word. You will be surprised how much you learn by active listening.

Teaching Adults

Adult Basic Skills educators are experienced participants and want useable results from professional development. They attend workshops because they want to “take home something useful.” Probably the most useful information participants take home from a workshop is new skills they can then teach and exercise handouts they can easily
adapt for their classes. Other items may be useful, such as printed resources and web site addresses, and an important part of your job is to identify these items.

Trainers who recognize the nature of the adult-learning situation can design, deliver, and evaluate training that is fun, effective, and easily adapted to enhance teaching and learning in the classroom. As you plan your workshop and presentation, keep in mind adult learning characteristics.

Adults bring to any learning situation an enormous memory bank of information that can be useful in further learning. This includes memory for:

- Knowledge gained through trial-and-error experimentation,
- Patterned responses,
- Data, numbers,
- Words, information, concepts,
- Smells, tastes, sounds, sights, tactile memories,
- Spatial relationship memories,
- Problem solving approaches that work and do not work for them, and
- Preferred learning styles.

Good designs for adult learning taps into any or all of these memories to enhance participants’ abilities to learn. Remember that peer training is the most effective technique for learning.
Always remember that to maximize learning adults need to be actively involved. An important component of that involvement is a feeling of accomplishment. This is not possible if the adult participants do not feel respected and accepted, so it is important to foster the affective domain. Leaders need to respect and value opinions and input. That is second in importance only to feeling respected, valued, and accepted by other participants. While this may sound like a need unique to younger learners, few of us ever outgrow the need to be accepted and respected by our peers.

One way to encourage a sense of self-worth is to recruit the help of participants in guiding and conducting workshop activities. More learning occurs when adults feel like they have been allowed to choose what they will learn. Adults like to see a personal payoff from the time they spend teaching and learning. That payoff is most easily recognized when there is an obvious direct relationship to their jobs.

Remember, adult learners tend to prefer single-concept or single-theory training (Zemke & Zemke, 1984). Adult learners want to see the immediate value of the skills and knowledge they are taught. They require information on the significance and application of the training topic (Vella, 1994). Adult learners like to build on prior experience. They expect the opportunity to relate what you teach them to what they already know or have given serious consideration (Knowles, 1990).
Accommodating Differences

Diversity creates opportunities. When participants bring a wealth of cultural backgrounds to a workshop, it can greatly enhance learning. Take advantage of diversity by eliciting input from participants with varied perspectives. Workshops should always be a learning experience for leaders as well as participants. Encourage expression of views from participants of various backgrounds and experience to enhance the learning of both participants and trainers. Of course, everyone’s learning, and the overall success of the workshop, depends upon the leaders’ respect and acceptance of diverse cultures, religions, and socioeconomic backgrounds. A biased workshop leader is an ingredient for workshop failure.

Age Differences

Do not make the mistake of thinking, much less saying, that people over 40 do not learn as quickly as “younger” participants. There is ample evidence that age does not affect the ability to learn, or the ability to learn quickly (Lawson, 1998, p. 57). Of course, older participants are less likely to be skilled at the use of computers and other technologies, and
their declining reflexes and dexterity may affect their keyboarding speed. What are often labeled as age differences are actually differences in familiarity with computers, the Internet, search engines, and the process of locating information. If a training goal is to improve the ability of participants’ use of technology, workshop planning should include consideration of how and when less skilled participants get to practice using technology. If that is not one of the major training goals, plan workshop activities that allow all participants to learn. Asking participants to use technology during learning may put some younger participants and a lot of older participants, at a significant disadvantage.

It is equally wrong to characterize younger participants as lazy or generally inattentive. The reasons that many younger participants respond well to active learning may be related to the learning styles they have developed when using computers, playing videogames, etc. Since older participants also respond well to active learning, it is possible to accommodate age differences by getting participants involved in workshop activities that teach the workshop material, as long as those activities do not rely on physical skills that are likely to make some participants feel inferior.

Older adults are looking for real life applications. They want to learn material for which they can see an immediate application. Since younger adults can also be motivated by seeing real life applications, it is possible to enhance training for participants of varying ages by remembering to make the material relevant and by presenting the information in a way that makes its applications obvious.
Cultural Differences

Participants from different ethnic groups and cultural backgrounds enrich discussions via their varied experiences and perspectives. Frequently they see things in a different light, and their inputs help other participants broaden their thinking. Workshop leaders should encourage input from participants of different cultural backgrounds in a way that does not imply or reinforce a common stereotype of people from a religion, national origin, or ethnic group. Workshop leaders should quickly and tactfully correct stereotypical characterizations implied by questions or comments of other workshop participants, without appearing to be condescending.

You can enhance the diversity of your training materials and recognize the diversity of workshop participants by using names, photographs, etc. from a variety of cultures in the examples you use during the workshop. When choosing videos and other training materials for the workshop, you should always consider cultural diversity.

Do you think it is important to make eye contact with all participants? If you do, you are either ignoring or not aware of the perspectives of varied cultures. In some societies, making eye contact is perceived as disrespectful or even threatening. Whereas most workshop leaders realize that calling people by name creates a better learning environment, many avoid using names they fear they cannot properly and easily pronounce. The use of names is more important to some cultures than others, and failure to learn and use participants’ names may be interpreted as a lack of respect. Obviously, it is important for workshop leaders to become familiar with the social customs of a variety of cultures.
Checklist 7: Meeting Individual Learning Styles

1. As a trainer you are faced with teaching a mix of participants ranging from new instructors to seasoned veterans. How do you plan to meet the diverse needs of these participants?

_________________________________________________________________
_________________________________________________________________
_________________________________________________________________
_________________________________________________________________

2. People gain a feeling of safety and security by feeling “connected” to other people and by feeling that they belong. This feeling of belonging, supported through groupwork, gives participants the confidence to face new challenges. When you conduct training, how do you plan to involve participants in learning?

_________________________________________________________________
_________________________________________________________________
_________________________________________________________________
_________________________________________________________________

3. To maximize learning, adults need to be actively involved. How do you plan to actively involve participants in your training?

_________________________________________________________________
_________________________________________________________________
_________________________________________________________________
_________________________________________________________________
4. Adult Basic Skills educators want to “take home something useful” from professional development. What new knowledge will the participants take home from your training?

_____________________________________________
_____________________________________________
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5. Diversity creates opportunities. How will you use the participants’ diversity to create learning opportunities and enhance training?

_____________________________________________
_____________________________________________
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Chapter 8

Using Visual Media

There are two major reasons for making elaborate use of visual aids. The best reason is supported by the work of Doug Malouf which states that sight has a much greater impact on learning than hearing, or any of the other senses (1993, p. 81). Karen Lawson describes the other reason in *The Trainers Handbook* in which she summarizes the results of two major research studies (1998, p. 153). Those two studies showed that presenters who use visual aids get higher ratings from participants. Not only were the presenters that used visual aids judged to be better prepared and more professional, but they were also rated as more interesting, more persuasive, and more credible. Properly prepared visuals can result in more learning by workshop participants, with the bonus of participants having a higher opinion of the presentation.
Malouf believes that presenters are twice as likely to achieve their goals if they use effective visual aids. Next to active learning, visuals are probably the most reliable means of maintaining interest and attention in larger presentations.

**How Visual Aids Contribute to Learning**

There are a variety of reasons why visual aids are so effective. First, most presenters do a better job of giving a logical presentation when they use visual aids to guide the presentations. Second, extensive use of good visuals encourages concise presentations, so the presenter is better able to stay on schedule and avoid excessive wordiness.

A picture is worth a thousand words, especially when that picture illustrates an object or a process. Most of us would consider the loss of sight to be devastating because we have developed such a strong dependence on it. Look around you at all the things that you could not thoroughly appreciate if all...
you had was a verbal description. Think of how often we see things that do not appear as we expected after we heard them described. Pictures bring words to life. Even flow charts help participants visualize dynamics, unless those charts are too “busy” for participants to understand.

Sight enhances memory. We are all more likely to remember things we see than we are to remember things we hear. Participants are much more likely to be able to reconstruct, in their minds, the concepts and ideas illustrated by visual aids, assuming, of course, those visual aids are well prepared and adequately explained.

Therefore, the workshop plan you develop should be supplemented with a selection of appropriate visual aids. Handouts, flip charts, or transparencies guide discussions and help keep participants cognizant of the goals and progress of a session. To be effective, these tools should be attractive and unambiguous, planned carefully, and prepared well in advance. Remember, problems such as computer and copier malfunctions can destroy the best of plans. Prepare workshop materials and tools early enough to be able to resort to alternative devices. If audiotapes, videotapes, or films are the best way to illustrate a topic or technique, planning and timing become even more important. Incorporate these teaching tools into the workshop plan; only then can they become learning tools that greatly increase the workshop’s effectiveness and efficiency.
Handouts

Your success as a trainer depends on what participants remember after the training is over. The retention of what participants learn during workshop sessions can be greatly increased by the proper use of printed and other materials. Do not rely entirely on participants’ abilities to remember. Give the handouts for later review.

Good handouts are concise and interesting. While there may be situations that justify a thick packet of handouts, the percentage of participants who use the entire handout probably decreases in proportion to the number of pages in the handout. It is a good idea to include illustrations such as charts and graphs in your handout packet so participants can study and reflect on them at their own pace. Since reflection occurs or reoccurs at a future date, concise descriptions and explanations should also be included. However, excessive wordiness discourages reference to the handout. Keep explanations concise.

Be sure to include the following in your handouts:

- the purpose of the training;
- an agenda including subjects and breaks;
- summary or outline of subject matter; and
- the name and contact information of all facilitators.
Important Considerations

Handouts and other training materials must be appropriate for the level of understanding of the workshop participants or they will be counterproductive. It is essential that the workshop planning process include evaluation of participants’ background knowledge. As registration progresses, the presenter should look for registrant characteristics that support predictions of the participants’ knowledge base or needed adjustments in the presentation.

Of course, it takes time to develop and prepare quality handouts and visual aids. It is certainly important to include visual aid and handout preparation time in the overall workshop plan.

It is important to budget time and money. Good visual aids can be prepared without excessive cost, but budget constraints may limit choices of pre-prepared visual aids. In some situations, cost considerations may limit availability of supporting technologies such as projectors, computers, large-screen monitors or televisions, thereby limiting the use of visual aids that depend on them.

Of course, the number one consideration in preparation and selection of visuals is their value for making the subject matter easier to understand. To do that, you must be thoroughly familiar with the subject matter and know the audience. The same material should not be used with a group of veteran educators as with rookies, even though the subject matter might be the same. Cost will always be a factor. Trainers must learn to provide good, but inexpensive, visuals that really work.
Projection of Visuals

A few years ago, projectors were used to show movies, slides, or transparencies. Now videotapes and computers have replaced most movies. They should be shown on a screen large enough for the audience and room size. If a large screen television is not adequate, a high technology classroom may be equipped with a projection system that connects a VCR or a computer to a projector.

Perhaps you remember those noisy “opaque projectors,” which allowed a presenter to project a written page and other flat surfaces. When it became possible to make transparencies from written pages on a copier, opaque projectors became obsolete. Now the Elmo projector allows projection of three-dimensional objects as well as flat pages, and it is quieter than most overhead projectors.

Now written pages, transparencies or PowerPoint slides can be used to:

- Introduce or summarize material—you can show the audience your agenda before you begin and recap the main points at the end
- Emphasize key words—large lettering and appealing pictures allow you to emphasize main concepts
- Illustrate a case study
- Display a sequence—the sequence could, for example, be the steps in a process
- Provide visual cues—by showing a picture used earlier in your presentation, you provide a powerful memory aid
When preparing transparencies, handouts or PowerPoint slides:

- Keep them simple.
- Avoid crowding too much on one page or slide. Use the 5 x 5 rule, i.e. not more than 5 lines per slide and 5 words per line.
- Use keywords, phrases, and numbers.
- Use large lettering (font size 24 or larger) so visuals can be seen from the back of the room.
- Bring them alive with color, cartoons, and pictures.
- Use an outline format or otherwise identify the place of each page/slide in the presentation sequence.
- Be concise.

Before beginning the presentation make sure the people in the back row can see the screen. When projecting visuals do not stand in front of the projector. Use a pointer, not your finger. Keep the unit in focus. Turn the projector off when it is time to redirect the attention of participants. Keep the room dark enough for participants to read what is projected but light enough for them to take notes. Do not talk to the screen or with your back to the audience.
Remember to practice using the projector before the workshop begins. Be sure you know how to work the equipment. If you are projecting, know in advance how placement of projector orientation alters orientation of the projected image. Upside down or otherwise disoriented images destroy the flow of the presentation and distract participants’ focus.

Projectors have bulbs. Bulbs burn out. What will you do if that happens during your presentation? Slides get stuck in slide projectors. How much time will be lost, and what will participants do during that time? If you cannot answer those questions to your own satisfaction, seriously consider modifying your workshop plan. Technologies fail. Computers crash.

Most PowerPoint users make transparencies because they know the risks of relying on computer hookups and networks, especially in new places. No one should plan to do a PowerPoint presentation without having a backup plan.

PowerPoint presentations can be very “slick” because it is easy to introduce one item at a time to direct focus to that item. However, it is possible to make transparency presentations that are almost as effective. If equipment is limited or time constraints make PowerPoint setups undesirable, remember that you can do the following with transparencies:

- Provide colored backgrounds.
- Use colored lettering if a color printer is available.
- Create, with practice, a smooth overlay presentation that introduces one item at a time.
- Create, with practice, a dissolve effect by introducing the next transparency into the
light beam and moving it down to the stage as you remove the last transparency.

- Write on transparencies, even with colored markers if desired.

The last item on the list allows you to do things with a transparency presentation that you cannot easily do with PowerPoint. One technique that is easy to utilize with transparencies is to vertically list an acronym, then write the words that belong with each letter. While it is possible to do that with PowerPoint, writing on transparencies allows listing of words or ideas as participants generate them. Also many presenters are more skilled at putting non-text items, such as charts or drawing, on transparencies than into PowerPoint presentations.

Regardless of what you are projecting, screen placement can be critical. Make sure that everyone is able to see the screen and that neither you nor the projector blocks anyone from seeing. Fill the screen but, of course, do not run over.

Flip Charts

Flipcharts have three major advantages.

1. They are very versatile with very low cost.
2. They provide an easy way to record participants’ ideas as they are generated.
3. Pages can be taped to the wall or put in other strategic locations as a reference for the remainder of the workshop.

Flipcharts are an active and effective visual. They can be prepared ahead of time as well as created
during the training presentation. Not only can flipcharts be used to record and present information and ideas during a presentation, but they also offer a means to outline and reinforce key points or present illustrations, sketches, graphs, diagrams, and other visuals.

Flipcharts are portable and inexpensive. They are spontaneous and flexible; you can vary the way you use the flipchart according to how the audience reacts. An informal atmosphere is easy to maintain when using flipcharts. The group feels a sense of relaxed involvement with the presentation. However, flipcharts are not suitable for large audiences. If they are re-cycled, they quickly lose their freshness and begin to look old and worn.

When preparing flipcharts in advance it is more eye-catching to include visuals such as sketches, graphs, numbers, and pictures. Limit the amount of information on each page, about five words per line and six lines per page. Be sure lettering is large enough to be read from the back of the room. Use maximum contrast between lettering and background—black on white, black on yellow, orange on blue, green on white, etc. Plan the layout of your prepared charts by doing a draft copy first.

When using a flipchart, stand to the side so it is always visible to the audience, however face participants when speaking. Write clearly and quickly when creating “live” charts.

If you are artistic you can impress many workshop participants by making sketches.
during the presentation. Make an advance plan in pencil on the flipcharts, creating outlines of sketches, then filling them in during the workshop. Write notes lightly in pencil on the flipcharts to serve as a presentation guide.

**Chalkboards and Whiteboards**

Chalkboards and whiteboards have many of the same advantages and limitations as flipcharts. One glaring exception is that material cannot be saved for later reference in the same way pages torn from a flipchart can be saved.

**Videotapes**

Most of us are very familiar with the potential of videotapes for illustrating dynamic processes or showing the organisms and scenery of nature. Most of us also realize their limitations due to cost and the difficulty of finding products to meet your specific needs.

However, many presenters overlook the potential of video for illustrating specific points. Clips may provide illustrations. Don’t limit their use or efficiency by showing the entire video just for a short relevant segment.
Visual Aids Affect Handouts

It is common practice to print PowerPoint presentation slides to use for handouts. This keeps participants from getting lost in their attempts to copy every word that appears on the screen, especially if participants are given the handout before the presentation begins. However, there are major drawbacks to giving this or any other type of handout to participants just prior to a presentation. When participants are reading ahead for a presentation overview, their attention is not focused on the presenter. Also, the presenter loses a lot of opportunities to use drama and surprise to inspire attention. So many participants already know what is coming next. When participants have a choice of attending other concurrent workshop sessions, there is also the risk that a participant will grab a handout and attend another session.

Some of those problems can be avoided by giving participants handouts at the end of the session or by posting them on a web page. However, the loss of a note-taking guide puts most participants back in the “copy what is on the screen” mode.

Using a narrative handout that does not merely reproduce the PowerPoint slides keeps some participants from trying to read ahead. However, participants who read ahead during the presentation are even more distracted since reading a narrative handout requires focus.

Less formal presentations that rely on participants’ input require a different approach to handouts. When the workshop presentation’s techniques and strategies are more participant-based, handouts can be used to:
set the stage for participant discussions,
> present data in tables, charts or graphs, and
> provide a list of references or web page addresses.

Presenters can provide pre-discussion handouts to inspire participation and discussion. These can be supplemented with end-of-session handouts that summarize major points addressed during the workshop session.

Regardless of which approach is used, a bibliography is a very important part of a handout. Participants should not be asked to copy references or web page URLs during a workshop; those should be provided in handout form. Remember that references add authenticity to a presentation, and they may stimulate future research and thought.

**Guidelines for Using Visual Aids**

1. **DO NOT READ VISUALS TO THE PARTICIPANTS!!!** Reading visual aids is insulting to participants and boring.
2. Face the group. Do not talk with your back to participants. If you are adequately prepared, a brief glance at a visual should be all that is needed to keep your presentation on track.
3. After you have covered a topic, remove the transparency from the projector.
4. Encourage questions, particularly when showing tables, charts or graphs. Remember that their structure is not always immediately obvious. There is no benefit to showing data when participants are not given time to understand what is being shown and what it means.

5. Keep visuals simple. Confusing visuals frustrate participants and carry the risk of destroying interest in the presentation.

6. Avoid time gaps for visual aid setup. Select visuals that can work without major delays.

7. Select visuals that provide sufficient color contrast for easy reading. Remember that some colors blur when people have colorblindness.

**Summary**

When visual media is used well, it significantly increases the impact of, and reinforces, your message. If visual media is used incorrectly, it detracts from your presentation and you will have missed an excellent opportunity. Always keep in mind the great potential of visual media; take it seriously, and you will magnify your impact.

By the imaginative use of “active” visual media, you allow your participants to “see” what you mean and enjoy it at the same time. Practice makes perfect. Practice your presentation using visual media beforehand to increase your chances of a successful presentation.
Checklist 8: Using Visual Media

When planning:

☐ What types of visual media do you plan to use?
☐ What does your time and budget allow?
☐ Call ahead to the meeting place to see what type of media is available in the meeting room.

Become media savvy:

☐ If using a computer, check the platform and the software available.
☐ Know the media hardware and software you will use or have a knowledgeable technician nearby.

Know your meeting room and audience:

☐ How large is the audience?
☐ Will everyone be able to see?
☐ How many handouts are needed?
☐ What types of visual aids best illustrate the concepts?
☐ Which visual aids best complement the presentation style and information?
When making your visual aids:

- Bring visuals to life using colors and images.
- Use a large font size.
- Simplicity is best; this makes your visuals and your points more powerful.
- Use keywords or phrases.
- Be concise. Overcrowding detracts from visual effectiveness.
- Design visuals that are current and appropriate to the audience.
- Make a summary slide or handout with additional resources, web addresses, and your contact information.

When it is time for your presentation:

- Arrive early to check equipment and programs. Set up screen and projection system.
- Check for easels or wall hooks for flipcharts.
- Locate a copying machine on site.
- Have a backup plan.
Chapter 9

Polishing Communication Skills

Most workshops take on the “tone” initially portrayed by the presenter. A somber, business-like approach elicits a different set of participant reactions and responses than a warm friendly opening. During the first few minutes, participants will judge whether the workshop is going to be casual or formal or participatory or presenter dominated. Participants also gain a pretty good idea of whether the workshop will be stimulating or boring.

Body Language

The first, and most lasting, clue to the character of the workshop is your facial expressions. Do you look scared, radiant, tired, or mean? Are your facial expressions animated or frozen? Do you look natural? It is very important that you enter the workshop with
a mindset that allows your facial expressions and body language to put participants at ease and set a tone for learning.

Being nervous does not keep you from looking happy and reflecting an attitude of true interest in your audience. Becoming more comfortable and relaxed as a presenter is certainly a worthwhile goal, but achieving that goal is not essential to workshop success. Planning, preparation, and genuine concern for the welfare and learning of participants spawn successful workshops. Focusing on participants’ needs, goals, opinions, and welfare is the quickest way to overcome stage fright because doing so helps you stop concentrating on participants’ opinions of you.

If you are genuinely interested in the welfare of the workshop participants, they will detect interest in your eyes and hear it in your voice. Good content, obtained by thorough research and preparation, is the essential starting point for any workshop. However, research on quality presentations indicates that content only accounts for about 7% of what the audience believes (McArdle, 1993). Getting your message across is, therefore, highly dependent on how it is delivered. Workshop success depends on participants’ believing what they hear and making mental connections with existing knowledge. Visual images account for about 55% of the learning that occurs in a workshop (McArdle, 1993). When planning and conducting the workshop, remember the quote, “Stand tall and say it with pictures” (McArdle, 1993, p. 101). Your expressions and body language are a big part of what participants see.

If only 7% of participants’ acceptance of your message is based on content, the other 93% of how participants respond to your presentation will largely be based on your non-verbal communication and
voice tone. One or more of the following suggestions may enhance your personal presentation skills:

- Establish your comfort level with the group through natural, positive body language. Maintain good posture. You want to look poised, confident, comfortable, and relaxed. Move gracefully, fluidly, and with purpose. Use gestures that are natural, spontaneous, meaningful, lively, expansive, and precise.

- Avoid putting your hands near your mouth or face—those gestures signal insecurity. Watch out for distracting gestures such as fidgeting, playing with your hair, or tapping a pencil.

- Individualize your audience by making eye contact. Do not stare at your notes. Select two or three friendly faces and look at them frequently for support. Allow your eyes to meander across the room.

- Be aware of the pace and volume of your voice as you speak. Try to speak slightly slower than you would in an ordinary conversation. Speak loudly enough for all to hear. Varying both the rate and tone of your voice helps to keep the audience’s attention.

- Alter speech habits that are annoying to listeners. Avoid fillers like “um,” “ah,” and “er” which are distracting. Guard against the use of “you know” and “like.”

- Consider listening and viewing a videotape of you giving a sample presentation. This is a great way to pick up on any annoying mannerisms you may be using.
Encourage Interaction

A fundamental way to initiate participation is through the use of carefully planned questions. Ask questions that encourage participants to share their knowledge and experiences with others. Good questions make the difference between a passive audience learning poorly and an active audience learning effectively. Questioning is a particularly appropriate technique with adult learners who often bring to the workshop useful skills and information that they are willing to share if you encourage them (McArdle, 1993).

The two most important functions of questions are to encourage participation and to facilitate learning. Questions designed to encourage participants to share their ideas and experiences with others are necessary to create a participatory workshop. Questions can also challenge participants to think. “Fact questions” are seldom appropriate for the workshop environment because they create too much of a “school” atmosphere, and the answers contribute little to the discussion. Instead, questions should encourage workshop participants to think, guess, compare, judge, and synthesize ideas, and then apply their knowledge to solve a problem. McArdle
states that “thinking questions” help motivate the audience and encourage participation (1993, p. 87).

To keep discussions lively, compliment responses with short phrases such as “good point” or “excellent comment.” Maintaining eye contact with respondents helps them stay focused on the topic at hand. Tactful interruptions should only be used to cut off rambling responses or refocus a respondent on the topic. It is usually possible to get respondents back on track by phrasing comments to show you value their response.

Do not allow the discussion to degenerate into a gripe session. Encourage participants to plan solutions rather than complain about things they do not think they can change.

Be open to new ideas. Do not try to manipulate responses to get them to follow your agenda. It is especially important not to belittle responses. Disagreeing with a response is seldom appropriate unless that response would generally be considered offensive. Even then be diplomatic or “bring the person into the politically-correct 21st century.” To avoid squelching the discussion, strive to be non-judgmental.

Participants have a variety of reasons for asking questions. Inquirers may not seek information, but may be testing your knowledge, trying to show their own, or trying to make a point. They may even ask questions they think will gain your approval. Your ability to effectively handle the inquirers and their questions is important to the overall success of your presentation.
All questions should be received in an open, friendly manner unless they are obviously designed to offend others or disrupt discussions. Not over-reacting or getting defensive goes a long way toward disarming those questions that are intended to “put you on the spot.” Of course, you can smile and jokingly say, “Are you trying to put me on the spot?” or, “Are you testing me to see if I know what I am talking about?”

It is a good idea to restate the question so that all participants hear it and to insure that you understand it. Restating the question also gives you think time. A quick analysis of the participant’s purpose for asking the question may help you formulate your answer. The length and content of your answer should be guided by the opportunity this question offers for emphasizing major teaching points. When answering questions use the KISS principle: Keep It Simple and Succinct (McArdle, 1993, p. 85). Do not answer with just “yes” or “no,” but with a short, to-the-point statement, perhaps supported by a brief example. The response may serve as a springboard to the next topic.

Remember that your answer to the first question or two either encourages or discourages additional questions from participants. Statements such as “That is a good question” or “I am glad you asked that” can put participants at ease and encourage them to make other contributions to the discussion, as long as you are obviously sincere.

If lecture is necessary, be sure to plan adequate time for questions. Pause frequently to ask for questions rather than expecting the audience to save questions until the end of the presentation. Leave time at the end of the presentation for questions and the discussion. If it becomes apparent that you have not left enough time for questions, be available following your presentation for individuals who still
have questions. As a last resort, inform participants of your e-mail address and phone number so they can contact you about unanswered questions.

Do not try to bluff the audience. Always tell them if you are not sure of the answer or are making an educated guess. Do not hesitate to say you do not have the answer to a question. Offer to find out the answer and respond at a later date.

## Handling Disruptions

No matter how well you have planned and prepared for a workshop, you cannot expect everything to go as planned. Even when a session gets off to a great start, things can go terribly wrong. A good trainer strives to predict the attitudes and behaviors of workshop participants and to deflect those that are undesirable. However, it is occasionally necessary to deal with disruptions during a workshop.

In some workshops the group dynamics lead the group in an undesirable direction. The presenter must quickly recognize when this is happening and change strategies to keep the workshop on track. This may require switching to an entirely different presentation style.

Sometimes one or two individuals disrupt the workshop. The most effective approach may be to ignore minor disruptions. That approach deprives disruptors of the attention they may have been seeking and gives them some time to realize that other workshop participants disapprove of their behaviors.

If the same individual(s) propagate additional disruptions or if undesirable behaviors spread to other participants, the workshop leader should take
action quickly. There are too many possible scenarios for us to enumerate all the best responses for each, but there are a couple of important guidelines for dealing with such disruptions.

First, never lose your temper. Losing control of your own emotions practically guarantees a loss of control over the workshop. The second important guideline is to avoid embarrassing participants by putting them down in front of others. A few possible coping strategies are listed below. These strategies were modified from suggestions made by Lawson (1998) and Silberman & Auerbuch (1998).

When one or more participants monopolize discussions:

- use small groups or pairs;
- summarize the participant’s viewpoint, then move on;
- ask the participant to “hold that thought” while others give their input; and/or
- ask the participant to wait until a break.

When someone persists in going off on a tangent:

- ask the participant to wait until later in the workshop;
- summarize the participant’s viewpoint and move on; and/or
- directly address the fact that a tangent has been raised – “That seems to be a different issue”—and restate the purpose of the discussion, asking others for input.
When the **private conversations** get to be a problem:

- use nonverbal methods to regain the participant’s attention (make eye contact, move closer);
- lower your voice or pause;
- ask one of the participants a question, making sure to say the participant’s name first; and/or
- ask the participants to refrain from talking (privately, if possible).

When a participant’s **jokes** begin to detract from the workshop atmosphere:

- ignore the jokes and resume the session after the humorous interjections (be as serious as possible);
- reinforce the person by complimenting his or her sense of humor; and/or
- privately ask the participant to minimize jokes.

When a participant **disagrees**, especially in a belligerent manner:

- present hard data in a respectful manner;
- summarize the participant’s viewpoint; ask others for their opinions;
- agree to disagree; and/or
- agree in part, then state how you differ and why.
When a participant ignores the group and begins **doing one’s own work:**

- switch into pairs;
- use nonverbal methods to get the participant’s attention;
- ask all to participate if a group activity is under way;
- ignore the behavior if it is not affecting others; and/or
- privately ask the person to participate actively in the program.

When participants fail to adhere to **time schedules**, i.e. arrive or return late to a session:

- minimize the distraction of the latecomer by ignoring the behavior;
- adhere to time schedules;
- remind participants of time frames; and/or
- privately request promptness as a courtesy to the rest of the group.

When some participants **do not participate:**

- use response cards;
- ask direct but nonthreatening questions;
- connect with the participants during break;
- ask the participant to be the leader in a small group activity; and/or
➤ leave such participants alone (just because they’re not participating doesn’t mean they aren’t learning).

When someone is sleeping during the workshop:

➤ walk near the person without being obvious;
➤ vary your voice;
➤ shift into pairs or subgroup discussion; and/or
➤ create a physical activity.

Other distractions:

➤ Use nonverbal signals, such as eye contact, to get the participant’s attention.
➤ Ignore the behavior if it is not distracting from the session.
➤ Privately ask the participant to stop.
➤ Request that beepers and phones be turned off.

The most important consideration in dealing with disruptions is to show respect for the individual or individuals involved. Always help the individuals involved maintain their dignity.

The other goals of your response should be to stop the disruptive behavior, to get the person(s) propagating the disruption engaged in the workshop, and to keep other participants involved in learning activities. You certainly do not want any participants to “shut down” or withhold participation in workshop activities.
Maintain your composure. Determine if you “struck a nerve” with something you said and see if there is a tactful way to soothe the irritated individual. If the disruptive individual is simply seeking attention or is a natural troublemaker, commend the disruptor for something and enlist the help of other participants by asking their opinions.

Remember that you can be wrong. Show gratitude to those who point out errors. Thank those who offer other viewpoints and point out the value of looking at issues from different perspectives. Never be defensive. Avoid being drawn into a long debate since that suppresses participation and takes time away from valuable learning activities.

One of the biggest challenges a trainer faces is to accept the fact that some things are beyond your control. When, despite all your efforts, the session still does not go according to plan, assess the situation as objectively as possible. Ask yourself what you could have done differently. Analyze your reactions concentrating on how to prevent or handle the situation better next time. Do not waste time fretting. Conclude that you did the best you could with a bad situation, learn from your mistakes, and focus your energies on your next project.
Checklist 9: Polishing Communication Skills

1. As you practice your personal presentation skills, do you look
   - ☐ poised?
   - ☐ confident?
   - ☐ comfortable?
   - ☐ relaxed?

2. Have you eliminated
   - ☐ distracting gestures?
   - ☐ staring at your notes?
   - ☐ annoying speech habits?
   - ☐ speaking too fast?

3. How will you encourage interaction during your training?
   _______________________________________
   _______________________________________
   _______________________________________
   _______________________________________
   _______________________________________
4. A good trainer strives to predict the attitudes and behaviors of workshop participants and to deflect those that are undesirable. Think about how you will deal with the following disruptions should they occur:

- Participants who monopolize discussions
- Participants who go off on a tangent
- Participants who are having private conversations during training
- Participants who refuse to participate
- Participants who are doing their own work
- Participants who come late or leave early
Chapter 10

Evaluating Results

Was your workshop a success? How do you know? These are very important questions that deserve careful analysis. Both you and administration deserve answers that have been verified with supportive evidence. For accurate answers, the evaluation process must be carefully planned and executed.

Why Evaluate?

There are many reasons for planning and completing a thorough evaluation of a workshop. Evaluations may be necessary for continued funding or for gaining administrative support. Thorough evaluations provide documentation of planning efforts and the workshop’s success. Trainers invest a lot of work in planning and facilitating workshops, so it is natural to seek evaluation for the sense of satisfaction it brings. However, the most important
reason for evaluating the workshop is to help with the planning of future workshops.

An obvious reason for conducting a well-planned workshop evaluation is the desire to know what did and did not work. The best workshop leaders have become the best because they devoted adequate time to improving their presentations. The improvement process began with thorough evaluation of their first workshops and continued through careful evaluation of subsequent workshops.

Determining if the training achieved your objectives is vital to identify areas that need improvement for planning future training and for selling the training program to superiors and potential participants (Lawson, 1998, p. 201). When you are asked to report results to superiors and others, provide evidence in the form of assessments.

Many workshops are conducted as part of a larger training program. That training program should be subject to constant review and modification based on progress achieved to date. Good workshop assessments are a critical component of on-going program evaluation and planning, especially when activity evaluations are tied to the needs assessment process (Lawson, p. 202).

**Six Myths of Measuring Training**

In her book, *Measuring the Impact of Training*, Pamela Wade lists six myths (1994, p. 9). They are:

1. “Evaluation and measurement are done at training’s end to determine if the program was successful.”
2. You really can’t measure the results of a training effort. You either believe in it or you don’t.

3. Measurement only works for skill-based programs.

4. If measurement is conducted at all, it should be the responsibility of the Training or Human Resources Department.

5. Administration hasn’t asked for measurement or evaluation. Unless they ask, I’m not going to make extra work for myself!

6. Right now, I have a great reputation and proven track record. If I ask for evaluation and measurement, I open myself up to extra work, and maybe even unnecessary criticism.”

Myth 1, evaluating at training’s end, is a fairly common misconception and is easy for the over-extended trainer to adopt. There are so many other things to do when preparing a workshop that it is very tempting to say, “I'll think about evaluation later.” “Later” will be too late to obtain baseline date, so failing to plan the evaluation eliminates a whole set of evaluation options. Also, planning the evaluation process is a valuable component of the overall workshop plan because it ties back into the goals and objectives.

Many researchers and workshop leaders have refuted myth 2, that you can’t measure the results of a training effort. Many workshop leaders have conducted assessments that provided data that proved invaluable for future planning of workshops and programs. Time and expense may limit evaluation activities, but careful planning and
creativity can overcome many budget and time constraints.

The reality of Myth 3, “Measurement only works for skill-based programs,” is that both “hard skills” and “soft skills” can be measured. The key to evaluating workshops that are not skill based is thorough planning supplemented by careful observation.

Myths 4 and 5, “Evaluation is not my responsibility and it creates extra work for me,” ignore the value of obtaining data for self-improvement. Letting someone else conduct the evaluation, even if it was possible to do that, puts your assessment in their hands, thus risking getting negative evaluations from a process that does not measure the appropriate variables. The fact that an evaluation is not requested does not mean that you will not be asked for a report on the success of your workshop.

Myth 6, “Evaluation opens myself up to extra work and unnecessary criticism,” is especially dangerous. It implies an acceptance of becoming stagnant. If you are that concerned about your status, you should be concerned about “standing still” and letting others pass you by. In addition, you deprive yourself of the satisfaction of finding evidences of success and of the opportunity for self-improvement.

When to Evaluate

There are four times when evaluations are appropriate. They are:

- before the workshop;
- during the workshop;
➢ immediately upon completion of the workshop; and

➢ a few weeks or months after the workshop.

Pre-assessments are conducted to provide baseline data so that knowledge gained can be measured by post-workshop evaluations. Pre-assessment is also important for workshop planning. Gauging the entry level knowledge of participants allows planners to tailor workshop activities to maximize the effectiveness of training.

Workshop evaluation should include observations by the workshop leaders during training activities. Rather than relying on memory, make notes of the degree of participation, number of people who abstain from activities, level of enthusiasm exhibited, how well each activity fit the time frame, and other observable indicators of participant interest and learning. It is important for the training team to meet as a group as soon as possible after the workshop to share and summarize these observations.

Reactions to the workshop and opinions of its value to participants should be gathered before they leave the workshop. Letting participants complete the workshop evaluation after they leave means the data will lose validity. In addition, the response rate will be greatly reduced. The same caution should be applied to any attempt to assess learning by post-workshop assessments.

Many workshops generate enough interest and enthusiasm that participants leave with the intention of applying what was learned. Evaluations completed immediately after the workshop do not tell whether you were able to make a difference in their future work. That can only be assessed after enough time has elapsed for participants to put the principles they learned into practice. After adequate time for application, survey participants to determine if they
are actually using what was presented. This follow-up survey also gives participants a chance to explain how well prepared they were for putting the principles into practice. Thus, follow-up evaluation measures lasting results, identifies areas in which trainees show greatest and least improvement, and allows comparison of follow-up and end-of-program responses.

**Designing Evaluations**

Evaluations measure a variety of areas. What areas do you want your evaluation to cover? Do you want to evaluate content, materials, instructional models, trainer, environment, logistics, or a combination of those items? The first step is to make a choice and then design the best evaluation procedure.

To insure thorough evaluations, prepare a questionnaire that evaluates each aspect of the workshop. However, because shorter evaluations get more attention, collect only data that has apparent value. Include questions that allow participants to express opinions and reactions, but also include specific questions that reveal the extent to which learning occurred. Broader questions often lead respondents to write about only a few aspects of the workshop that stand out at that time or concentrate only on the last activity. It is more difficult to summarize evaluations with broad open-ended questions because the workshop team has no clue about participants’ thoughts and opinions regarding the entire workshop.

Regardless of the type of evaluation used, the instrument should be short and simple. It is not an easy task to include questions to evaluate every aspect of the session or workshop and to include both
rating and discussion questions. Therefore, plan the evaluation questionnaire very carefully. Each question must be planned and selected to accomplish a specific and distinct objective.

Types of Questions

As you design your evaluation consider different types of questions. The different types of questions listed below were adapted from The Trainers Handbook (Lawson, 1998, p. 206). Lawson recommends selecting a combination of types of questions when designing evaluation questionnaires.

1. **Two choice questions.** The most commonly used choices are agree/disagree or yes/no. An example would be, “Did this workshop meet the stated objectives?”

2. **Two choice questions with elaboration invited.** Follow-up on number one above with a statement such as, “Please explain your answer.”

3. **Short answers.** Open-ended questions that require a brief response instead of just checking a box. For example, “What part(s) of the workshop were most valuable to you? Why?”

4. **Complete the sentence.** Respondents are asked to complete a sentence. For example, “I would like more information about …”

5. **Ratings.** Participants respond to a question or statement using some type of scale or rating such as a Likert scale. The Likert scale attempts to gauge both the direction (positive or negative) and intensity (slightly
agree/disagree to strongly agree/disagree) of opinions or attitudes. For example, “Today’s workshop covered material that I will be able to use.”

6. **Rankings.** Respondents rank a list of items in terms of importance. For example, “Please rank each topic in order of importance or relevance to your job from: 1 = least important to 5 = most important.”

7. **Checklist.** A checklist provides a “laundry list” from which participants can choose words that express their reactions. For example, “Check the phrases that describe your reactions to today’s workshop:

<p>| | | | | | | |</p>
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</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
</tr>
<tr>
<td>Strongly Disagree</td>
<td>Disagree</td>
<td>Agree</td>
<td>Strongly Agree</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Exceeded my expectations
Met my expectations
Fell short of my expectations
Was a total waste of my time.”

Regardless of the type of evaluation used, the questionnaire to be filled out by workshop participants should be the shortest questionnaire that solicits the desired data. Keep this in mind when choosing question types. The questionnaire should be studied and reviewed by all team members, and possibly by outside reviewers, with the primary goal of eliminating duplicate and unnecessary questions. Be sure that each question accomplishes a specific and distinct objective. Other goals of the review process are editing questions and insuring that participants correctly interpret and answer the questions you intended to ask.
Objective questions, such as two-answer and Likert-scale questions, are easier to tabulate when summarizing data for reports. This is especially true when there are a large number of workshop participants. Likert-scale questions can be summarized in terms of the median response or by a table showing what percent of participants chose each item. These tabulations lend themselves to graphical representations, such as bar graphs. Objective questions obtain data that workshop leaders thought would be important, which is both an advantage and a disadvantage. Focusing responses on specific issues means getting information the team thought was important but misses the opportunity to learn what participants thought was important.

Subjective questions ask participants to elaborate or make statements regarding why they liked or did not like this workshop. The responses to those types of questions sometimes amaze workshop leaders because they reveal issues that the presenters never suspected. Both positive and negative comments may surprise team members. However, these comments allow team members to learn about factors they did not anticipate. Comments about mannerisms and distractions may provide the greatest opportunities for future improvements or directions for future workshops.

Even when the presenters give the same workshop at other locations, this type of feedback can be invaluable because it may indicate which aspects of the training were not fully understood. Of course, the major disadvantage of open-ended evaluations is the time needed for respondents to answer the questions. Also, respondents without strong feelings tend to write short answers. The few people who are willing to take time to prepare thoughtful responses may bias the results.
Too often workshop leaders become aware that evaluation questions lacked specificity when the responses were reviewed. To avoid this problem, spend some time thinking about the potential responses to each question and then solicit reactions to the instrument from several colleagues. Use this feedback to refine the evaluation instrument.

Some workshops are best evaluated using before and after questionnaires to measure the change in knowledge or attitudes of workshop participants. Also, this format allows workshop presenters to gauge the participants’ expectations and determine the extent to which those expectations were met. This evaluation procedure might be appropriate for workshops that teach a particular skill.

Plan sufficient time into your schedule for evaluation. Participants should complete evaluations before they leave the workshop. Unfortunately, the most successful workshops stimulate discussion that continues until the end of the workshop. It is very tempting to use evaluation time to create schedule flexibility and enhance learning. This mistake, however, leads to a low response rate or incomplete evaluations, which causes the evaluation process to lose validity. If your workshop is scheduled to end at noon, do not hand out evaluation forms at three minutes till noon.

Immediate feedback generally improves responses to every aspect of the session and allows participants to recognize how the training has helped them.

**Data Summary**

Obviously, workshop planners want to compare favorable versus unfavorable responses. The
percent of favorable responses may not have much meaning if the response rate is low. This caution applies equally to unreturned and incomplete evaluations. For example, if a number of participants choose not to respond to a particular question, how should percentages be calculated? It is too optimistic to assume that participants who did not respond were indifferent or had opinions similar to those who responded. However, it would be equally unfair to assume that each non-response represented a negative opinion. The best the trainers can do is clearly indicate how many participants did not evaluate the item and state the percentage of responses from those who rated that particular item.

One caution about summarizing Likert-scale questions is the temptation to calculate mean (numerical average) ratings. Statistically, means of such ratings are not valid, even though means are a handy tool for making comparisons. Some people use a rating scale in which respondents are asked to circle “0” if they did not have an opportunity to evaluate a particular item, making that a lower response than the most negative choice. Neither means nor medians are valid if those zero ratings are included. For accurate statistical calculations the item in the center of the Likert scale, between the disagree/disapprove and the agree/approve end of the scale must be worded in a way that ensures it is really a neutral rating rather than a “was not present for this” or “did not have opportunity to observe.”

For maximum accuracy, the evaluation summary should be prepared immediately after the workshop. Each day of delay is likely to degrade the accuracy of the report. The process of reading and summarizing comments often causes the trainer to remember specific events or rater’s attitudes. A delayed summary also suffers as conditions, specifics, and atmosphere fade from the trainer’s memory.
Negative responses should not be taken personally. They are most valuable when planning future workshops. They represent a learning opportunity for the workshop facilitators; consider them constructively.

Participants are not the only people who should evaluate the workshop; all workshop planners and presenters should also prepare evaluations. The observations and reactions of presenters should be recorded as soon as possible. In the situation where a team has planned and conducted a workshop, an extremely worthwhile activity is a debriefing session in which all team members share and discuss their opinions and reactions. When this is done, it serves as a framework for building and improving future workshops.

Evaluation summaries are of interest to the participants as well as to the administration. Participants also have a stake in the process and appreciate knowing how others reacted to the workshop. It is always advisable to keep the administration informed. This should be done shortly after completing the workshop even if subsequent evaluations are planned.

Plan for Follow-up

The best indicator of success is each participant’s application of the information and ideas gleaned from the workshop. Consider a follow-up questionnaire to learn how participants actually put the ideas and techniques into practice. Alternatively, schedule a meeting of workshop participants to share how they have implemented the activities. They can be asked to make suggestions and observations that others will find beneficial.
**Sample 10.1: Evaluation Questionnaire**

Circle the number that best represents your reaction to the training.

A. I feel that I will be able to use what I learned.
   (disagree) 1  2  3  4  5  6 (agree)

B. The program was presented in an interesting manner.
   (disagree) 1  2  3  4  5  6 (agree)

C. The training facilities met my needs.
   (disagree) 1  2  3  4  5  6 (agree)

D. The presentation covered the promised objectives.
   (disagree) 1  2  3  4  5  6 (agree)

E. The trainer encouraged participation and questions.
   (disagree) 1  2  3  4  5  6 (agree)

What did you find most useful in the training?

What did you find least useful in the training?

Is there anything in this training that could be improved? Please explain.
Sample 10.2: Evaluation Questionnaire

Please take a moment to evaluate this training session by placing a mark on each of the lines below to indicate your opinion of the training. Position your mark at the appropriate spot between the two statements.

I believe this workshop was ...

<table>
<thead>
<tr>
<th>6</th>
<th>5</th>
<th>4</th>
<th>3</th>
<th>2</th>
<th>1</th>
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</thead>
<tbody>
<tr>
<td>Time well spent</td>
<td></td>
<td>A total waste of time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Relevant</td>
<td>Not relevant</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Useful</td>
<td>Not useful</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stimulating</td>
<td>Boring</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Participatory</td>
<td>Not participatory</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clear</td>
<td>Unclear</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Flexible</td>
<td>Rigid</td>
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</tbody>
</table>

Sample 10.3: Feedback During Workshop

Print each statement below on a separate sheet of flip chart paper and display the sheets on the wall.

I wish you would stop…
I hope you keep on …
I don’t understand …

During the 2nd half start …
I hope to learn about …

About five minutes before break, give each participant five Post-it® notes. Ask them to take a moment to answer the five questions (one answer per Post-it® note) and place their answers on the corresponding flip chart page as they begin their break.

Checklist 10: Evaluating Results

1. How do I plan to use the evaluations?
   - For self-improvement
   - Submit to my supervisor
   - Distribute results to participants
   - Develop additional workshops for this audience
   - Plan workshops for other groups
   - Prove value to participants’ supervisors or funding sources

2. What data do I want to collect?
   - What participants thought of presentation techniques
   - Value of workshop content
   - Quality of supporting materials
   - Need for additional training
   - Effectiveness of training techniques
   - Suggestions for improvement
   - Participants’ opinion of their learning
   - How well objectives were met
   - How much learning can be demonstrated

3. When am I planning to evaluate?
   - Before
   - During
   - Immediately after
   - Follow-up
4. How will I summarize results?
   - Count similar results
   - Calculate averages
   - Summarize opinions and written comments
   - Read only – no summary necessary

5. Which types of questions should I include on the evaluation form to obtain the best data?
   - Yes/no
   - Likert scale ratings
   - Subjective questions

6. Outline the questions you plan to use on your evaluation form below:
Chapter 11

Alternative Approaches to Professional Development

Workshops are just one of many ways to conduct professional development. There are a variety of self-directed activities, media-based activities, and on-the-job training activities that can provide or enhance professional development.

Which Is Better?

The choice of traditional or alternative training methods should be based on the individual situation. Workshop participants stand to gain a lot from getting away from their regular routine to focus on learning activities, network building, meeting the
experts, and being part of workshop discussions and directed activities. However, “getting away” is sometimes very problematic. Each alternative professional development approach offers some of the following advantages:

- ease of adaptability to learners’ schedules;
- more opportunity to focus on specific needs;
- more individualized instruction;
- ease of conducting in-depth training on a particular topic;
- more efficient learning, in terms of time;
- more active learning;
- greater individual responsibility for learning;
- ease of conducting specific follow-up activities;
- less structure may be better suited to some learning styles;
- more opportunity for learning from analysis, practicing, and reflection; and/or
- can be geared to specific desirable outcomes.
Media–based Activities

A wide variety of media can be applied to professional training. Media particularly valuable for individualized learning include interactive videos and computer-assisted instruction. These offer the opportunity for much more learning by trial-and-error, since learners are more willing to repeatedly risk being wrong than they would be with a live instructor or in the presence of other students. These technologies, plus videos, audiocassettes, and closed circuit and cable television offer opportunities for distance education activities that can save learners time and money. Where interactive technology is available for distance learning, learners can interact with each other, as well as with an instructor, just as they could in a classroom or workshop setting.

Web-based instruction is the current rage. Developing good web-based instruction is particularly demanding. It requires significant time input and technology investment as well as highly trained support staff. Web-based instruction can be designed to allow learners access on their own time schedules. There are significant benefits associated with being able to access web-based and other media-based technologies when the learner is “in the mood”
to learn or stop each learning session. Many people learn very efficiently when they are at home in pajamas.

Media-based and web-based technologies are costly to develop, requiring a major input of both time and money. Each has to be used by a large number of learners before the savings in travel and time offsets the initial investment.

**Self-directed Activities**

The term “self-directed” indicates that the learner has primary responsibility for planning and conducting the activity. Part of that activity may be seeking the help of others, but the learner makes the decisions about who to consult and whose advice to accept. The learner may have a helper, such as a student assistant, but the learner is the person who acts as the project supervisor. The learner takes the primary lead in fostering his/her own growth and development (Caffarella, 1993). Examples of such activities include projects, collecting pertinent materials, keeping a journal of professional practices, doing a literature review, and developing a research project or professional presentation.

When the learner is employed as an instructor, projects are often conducted during holidays and school breaks. Learners must schedule self-directed activities around the inflexibility of teaching, class preparation, and student tutoring or advising.
schedules, but, otherwise, can make their own professional development schedules.

Self-directed activities epitomize the advantages of active learning, individualized learning, adaptation to the learner’s schedule, and focusing on specific needs. However, the learner must be highly motivated and must have some knowledge and skills for doing literature and information searches. Most learners need deadlines to complete self-directed activities. Some activities have inherent deadlines, but those without often languish as the learner gets involved in other things.

**On-the-job Activities**

On-the-job training activities can be very individualized and goal specific. The training can occur under the guidance of a supervisor, or it can be a collaborative venture among co-workers. Solving a specific problem is a good on-the-job training exercise. Another is trying a new approach, such as the application of a new technology to achieve a specific goal. Staff rotations and peer coaching can assist on-the-job training activities.

This approach usually results in a high retention of learning, particularly when the learner has additional opportunities to apply the technique just developed and practiced. Another advantage is the chance to experiment through practice in a secure setting where supervisors demonstrate patience and acceptance.

Two advantages of this activity are active learning and focusing on specific needs. On-the-job training provides the opportunity for learning by analysis, reflection and practice, and usually puts the responsibility for learning on the learner.
Inquiry-based Activities

Inquiry-based activities are conducted to solve particular problems or meet specific needs. The components usually include defining the problem, planning and conducting surveys or experiments, collecting and analyzing data, and interpreting that data to reach a conclusion. This is likely to be a traditional research project, or possibly a reflective activity.

Either the learner must have some training or background in research methodology, or a supervisor or instructor with that knowledge must carefully guide the learner. Having some understanding and experience in qualitative, as opposed to quantitative, research is particularly helpful. Therefore, this type of professional development activity is not suitable for everyone. Other advantages of alternative training met by inquiry-based activities include:

- individual responsibility for learning;
- ease of follow-up activities;
- adaptability to the learner’s time schedule;
- in-depth training; and
- opportunity to learn from analysis, practice, and reflection.

To complete inquiry-based training, the learner must be an independent thinker. Most inquiry-based activities require a significant time investment by the learner, perhaps more than some learners can manage.
Networking

Networking includes arrangements for learners to collaborate and share learning experiences. Sharing takes the form of seminars, e-mails, threaded discussions, and/or informal discussions.

Network members share concepts learned at professional meetings, workshops, training sessions, visits to model programs, and designated topic investigations. For example, dialogue after attending conferences with multiple simultaneous sessions are advantageous.

The goals of this type of training may be to establish a knowledge base prior to making a major decision or investment or to develop a long-range plan. However, the network may be formed to engage in collaborative professional development in a more efficient manner that may also generate social benefits.

Network members do not have to be at the same location. Many professional organizations have special interest focus groups that meet a few times a year to share new discoveries and interact regularly via e-mail. Special interest focus groups may cross academic disciplines or may have members from different types of institutions. For example, a network may be formed for sharing among high school teachers, community college instructors, and university researchers.

Learners who attend professional workshops and meetings at the expense of their employer may be required to share the information through some type of network or other training activity. Even if the employer does not express that requirement, learners will benefit from sharing their new skills and knowledge through networking with others.
Action Research/Teacher Inquiry

Action research is conducted by practitioners who have a commitment to placing teaching and learning at the forefront of their professionalism by creating a positive climate for investigating issues they encounter. Although it uses less sophisticated methods than traditional scientific research, action research relies on an array of research approaches to solve specific problems for a defined group of learners, classroom situations, and/or learning needs.

The reflection and assessment phase of action research/teacher inquiry directly impacts classroom practices, thus enhancing decision making and empowering all who participate in the process. Findings are not generalizable to other situations as are those from scientific research. The goal is to find specific solutions to the situation being researched. Publication of previous research findings in professional literature adds to the instructor’s knowledge base. After undertaking action research, practitioners are less likely to accept theories or programs at face value, and more likely to prefer a professional approach to decision making.

Glanz suggests practitioners follow the steps outlined below for conducting action research/teacher inquiry (1998, p. 24).

1. Select a focus, issue, or problem
   a. Develop questions
   b. Establish a plan
2. Collect data
   a. Read the literature
b. Administer tests
c. Conduct surveys and interviews
d. Keep anecdotal records
e. Examine portfolios

3. Analyze and interpret data
   a. Study
   b. Reflect

4. Take action
   a. Continue
   b. Disband
   c. Modify

Action research as a group activity can reform programs. The group meets to define the issues. This process usually requires a series of meetings, discussions, and literature searches. The group then determines the data collection activities based on the question or questions to be answered. When data collection is in the form of observation and feedback, the group has a significant time investment in sharing their observations, arriving at a consensus on the interpretation of the data, and reaching conclusions about the results and/or the need for continued evaluation.

According to Drennon (1993), action research/teacher inquiry has the following benefits:

- focus on specific needs;
- in-depth training on a particular topic;
- active learning;
- individual responsibility for learning;
- ease of conducting follow-up activities; and
Coaching

What do you think of when the word “coaching” is mentioned? Think of a coach in your past; e.g. ball, drama, voice, track, dance, or speaking. What are the characteristics of outstanding coaches? Perhaps the most prevalent characteristic has to do with monitoring performance. A coach demonstrates a skill then teaches it in segments. Coaches intently observe every movement, hear every sound, and/or feel every emotion of the learners during practice to immediately correct any imperfections. The coach moves through the action with the individual learner. For example, a dance coach guides the arm and leg through the desired motions or a voice coach touches the throat so vibrations can be felt. A coach knows the importance of perfect practice and provides an environment where mistakes are not practiced.

Coaching as a professional development activity is no different. One professional coaching another constantly observes a skill or technique and provides prompt correction as needed. Concrete performance serves as the baseline data. Coaching,
then, includes discussion and demonstration that results in continuously improving performance. The interaction of people, skills, and conversation through coaching makes a difference in learning outcomes.

Five characteristics are noted by Kinlaw (1996) as essential for superior coaching:

1. Balance. It is a give and take relationship between two professionals who respect each other’s knowledge and experience.

2. Concrete dialogue. Concrete dialogue results in clear communication leading to improved performance. Specific language and definite expectations guide the learning relationship.


4. Definite process. Coaching follows a definite process. Goals are clearly stated and skills are accurately defined.

5. Respect. Respect between the professionals involves acceptance of each other. Only respect allows the other characteristics to unfold, resulting in a coaching experience that leads to a championship team.

One benefit of coaching is that the coach often learns as much or more than the trainee through the observations and thoughtful analyses required for effective professional development. In addition, coaching provides the opportunity:

- to focus on specific needs;
- to conduct in-depth training on a particular topic;
- to conduct specific follow-up activities;
for active learning with individual responsibility for learning; and
for learning through analysis, practice, and reflection.

Mentoring

The concept of mentor is derived from Greek Mythology where Mentor, Odysseus’ friend, was requested to develop a relationship with Telemachus, Odysseus’ son, while Odysseus was away at war. Mentor accepted this difficult relationship and dedicated himself to guiding Telemachus in seeing the errors in his judgment so he could grow in wisdom rather than rebellion. Similarly the role of mentor in professional development is to develop a personal relationship with a less experienced protégé that results in maturity and good judgment. Mentoring stretches the protégé to be more because someone believes in that individual’s potential.

Because effective teachers may be developed, a mentor is a well respected and trusted colleague who
fosters the growth of the less experienced protégé by taking a personal and direct interest in his education and development. The relationship is enhanced through mutual decisions on when and where to meet and what topics to discuss. Negotiating the most pertinent topics for concentration gives both parties ownership of the process.

The mentoring process is also very unique due to the fact that both parties grow professionally. The protégé gains independence as the mentor slowly lengthens the rope of guidance. Each celebrates diversity in character, style, background, and experience levels as the dialogue continues. A mentor/protégé relationship is not a monologue, not a top-down relationship. The reciprocity between mentor and protégé allows for a sharing of ideas that leads to learning from one another.

Mentors perform several specific tasks that take time and dedication to perfect. They break down multifaceted skills into manageable components to make learning more manageable for the less experienced protégé. They model a skill, then observe the protégé practicing and give specific feedback. Mentors discuss and reflect with the protégé to teach not only the skill in practice but also the metacognitive process that leads to improvement. And lastly, mentors build in the new colleague the ability to reason through teaching episodes that form an effective cognitive map of teacher/pupil interaction.

Mentoring reaches beyond the workday. It is a comprehensive relationship. This vision of professional development focuses on the whole person. It takes into consideration the fact that career is tightly intertwined with personal and private beliefs, values, relationships, and interests. Building a mentor relationship through supporting this
alternative professional development ultimately builds a sense of community throughout the program. The mentor relationship actually progresses through three stages. First, the protégé idealizes the mentor and fully depends on guidance. After a period of time unique to the relationship, the protégé gains greater independence. The mentor at this point takes on the role of negotiator. At last the relationship reaches a plateau of independent equals in which each party confirms one’s existence, worth, and potential.

Choosing Among the Options

Both trainers and learners should consider the advantages and disadvantages of the alternative professional development options described to tailor the best training plan for a given situation. In many cases a mix of training options that complement each other is selected. Time and money are obviously important factors for choosing among training options, but the long-term goals of training are also very important. Perhaps the three most important guidelines are to:

- make a long term plan,
- frequently reevaluate, and
- plan to share knowledge and skills with peers and coworkers.
Checklist 11: Alternative Approaches to Professional Development

1. Which alternative approach to professional development do you plan to implement?

2. What are the benefits of the approach you have chosen?

3. What are the limitations of the approach you have chosen?

4. Write your professional development plan on the next page. Include a time line from start to finish.
Bibliography


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