

Toolkit for Planning Education Events

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Introduction

This toolkit will assist you to plan, develop and deliver educational events for adults that provide a meaningful experience for all. It provides a structured process that is easy to follow and includes templates and samples. It is based on best practice in the field of adult education and the expertise of individuals with many years of experience in the design and delivery of educational events.

Who Is It For?

**Anyone!**

Need to develop a training session at your organization? Not sure where to start? Maybe:

* Someone just told you about a renowned guest speaker they heard and want to bring to your organization.
* You’re charged with planning a conference for a new “hot” topic in your practice area.
* Your organization was offered some new funding for training.

How Does It Work?

Whatever your situation, just follow the steps in this toolkit and you can produce a quality learning experience every time! A full set of templates is provided, as well as a sample to show you how each step might look.

**Step 1:** [Explore the Requirements](#step1)

**Step 2:** [Use an Outcomes-based Design](#step2)

**Step 3:** [Consider the Delivery Method](#step3)

**Step 4:** [Structure the Agenda and Activities](#step4)

**Step 5:** [Construct the Evaluation](#step5)

**Step 6:** [Manage the Event Logistics](#step6)

Step 1: Explore the Requirements

Sometimes developing a training session can feel like a big task. Avoid rushing into planning what you are going to do; first, explore what the training must accomplish. Ask three questions:

* Who is the *target audience* – the learners?
* What do *learners need and want* to know?
* What are the *requirements and budget* for this project?

Determining the Target Audience

Think about how you would describe your potential learners. Describing their key characteristics allows you to determine their interest in your session, to acknowledge and respect their level of previous knowledge and experience and to anticipate any challenges they might have with the upcoming session. You can then customize the session based on these factors. Use the following chart to launch your thinking about the target audience. Some characteristics will be more important for your session than others – you don’t need to complete the entire chart. When working with outside speakers, review the key characteristics of your target audience and confirm that they will customize their presentation to that particular audience.

| Characteristic | For example…. |
| --- | --- |
| Anticipated/ideal group size | Less than 20, 20-50, 50-100, more than 100 |
| Sector | Developmental Services, Justice, Mental Health |
| Occupation/Role | Clinicians, family members, managers, students |
| Geographic range | Local, regional, provincial |
| Education level | High school, college, university, post-graduate |
| Level of experience in the topic | Beginners, some experience, very experienced |
| Previous training related to the topic | Recent, within 5 years, more than 5 years ago |
| Main challenges learners face related to the topic | Longstanding, recent |
| Learners’ feelings about attending training | Excited, uncertain, not interested |
| Context(s) in which learners work | Environmental, economic, legal, political, social |

Assessing the Learners’ Needs

Assessing what the learners need and want to know is critical to customizing the session content to those needs and interests. Assessment contributes to participants taking ownership of applying their learning on the job. There are different ways you can find out what the session participants want to learn, including reviewing relevant documents and asking them directly.

Review related documents

Find out how the proposed focus of the session has been reflected in key documents and if any specific educational needs have been identified (e.g., policies, procedures, meeting minutes, government documents, etc.)1.

Ask potential participants directly

To collect information directly from the target audience, determine whether to do this through a survey or discussion, either from individuals or in a group setting. Select the format that is the best fit for your work situation, timing and context. Describe the purpose of the session in plain language and focus the questions on what learners need and want to come away with at the end of the session. Some questions might include:

* What three topics are most important to you and your work?

Note: you can ask this as an open-ended question or provide a list of potential responses that can be checked, with an “other” option for respondents to fill in (see the template).

* What are the reasons why you identified those topics?
* How would you rate your ability on each topic on a scale of 1 (low) to 5 (high)?
* What is your occupation, role, region, number of years’ experience, etc.?

To analyze the needs assessment data, look for common themes among the participants’ answers to the questions posed and across the documents you have reviewed, including similarities and differences.

Clarifying Budget Requirements

Before establishing a formal budget for your educational event, anticipate what requirements and limitations you have, such as:

* What specific budgetary guidelines were provided by the person who made the request?
* What other resources are available, e.g., funding, human, time?
* What resource constraints need to taken into account, e.g., funding, human, time?

Now that you have thought about the event’s requirements, you are ready to prepare a budget. The template provides easy-to-use guidance.

For templates, see [Step 1 in Appendix A](#step1template).

Step 2: Use an Outcomes-Based Design

A key difference in an outcomes-based approach to session design versus the more traditional content-based approach is that planning starts by asking what learners are going to do differently on the job as a result of taking the training, rather than jumping straight to content or an idea for a speaker.

* This “outcome” is what a learner changes in their work; it connects what they “know” from the training or education with the “know-how” applied back on the job2.
* Having clear outcomes also aids in evaluating the training, as you can follow up with participants at different time-points after the training to see if the outcomes were achieved.

Writing the Learning Outcomes

To write a learning outcome, simply fill in the blank of the following sentence: After this event/session/course, participants will be able to *(action word and behaviour)* back at work.

Examples of action words and behaviours (something you can see or hear):

* *List the values associated with our strategic plan.*
* *Work collaboratively to identify and address department budget constraints.*
* *Design one course curriculum.*

Designing the Session

Once the learning outcomes are set, you can design the rest of the training session, including how the outcomes will be assessed, what process skills are needed and what concepts/issues will achieve that.

The chart below outlines questions that can help you “design back” your session from on-the-job outcomes through the assessment tasks, skills, concepts and issues that participants must proceed through in order to change their performance2.

|  |  |  |  |
| --- | --- | --- | --- |
| IntendedOutcomes | AssessmentTasks | ProcessSkills | Conceptsand Issues |
| *What do learners need to be able to* ***DO*** *“in their work” that we’re responsible for addressing “in the training session”?**For example, post-session performance.* | *What will learners do in the training to demonstrate* ***evidence*** *of what they can do?**For example, in-session evidence of performance – assessment of tasks.* | *What* ***skills*** *must the learner master to demonstrate what they can do?**For example, specific acts, ability to do tasks – process skills.* | *What must the learner* ***understand*** *to demonstrate what they can do?**For example, specific facts, patterns, values, motivations – concepts and issues.* |

On the next page, an example of learning outcomes for a session on Prader-Willi syndrome (PWS) is provided. Prader*-*Willi syndrome is a complex genetic condition that affects many parts of the body.

| PWS IntendedOutcomes | PWS AssessmentTasks | PWS ProcessSkills | PWS Conceptsand Issues |
| --- | --- | --- | --- |
| *What do learners need to be able to* ***DO*** *“in their work” that we’re responsible for addressing “in the PWS training session”?**For example, post-session performance.* | *What will learners do in the PWS training to demonstrate* ***evidence*** *of what they can do?**For example, in-session evidence of performance – assessment of tasks.* | *What* ***skills*** *must the learner master to demonstrate what they can do?**For example, specific acts, ability to do tasks – process skills.* | *What must the learner* ***understand*** *about PWS to demonstrate what they can do?**For example, specific facts, patterns, values, motivations – concepts and issues.* |
| 1. Identify the unique characteristics of PWS
 | Answer test questions | * + Discuss how the characteristics of PWS differ from those of other developmental disabilities
 | * + Characteristics of PWS
 |
| 1. Describe the behavioural management strategies that would best support a person with PWS
 | Complete a case study | * + Identify the specific behavioural issues and recommend interventions
	+ Collect data to monitor behavioural issues
 | * + Unique philosophy around supporting individual with PWS
	+ Strategies to assist the person to manage their food intake
 |
| 1. Identify the health concerns of people with PWS
 | Complete a case study | * + Identify key factors to look for when assessing a person with PWS to identify health concerns
 | * + List the common health concerns of a person with PWS and how they present
 |
| 1. Communicate information about the primary health concerns of a person with PWS to family members
 | Participate in a role-play | * + Demonstrate specific techniques for relaying health concerns to family members in a clear and compassionate manner
 | * + Understanding the issues/concerns that families have
	+ Techniques for effective communication with families
 |

For templates, see [Step 2 in Appendix A](#step2template).

Step 3: Consider the Delivery Method

There is a number of training delivery methods you can use. The key is to consider the method that best suits your audience and learning objectives – face-to-face session (i.e., in the same room/physical location), technology-based (e.g., videoconferences, webinars, online modules, e-learning), or blended learning (hybrid of the two). Also, look at what other educational resources are already available that might suit your needs.

Comparing Delivery Methods

The table below provides some general information about options for delivery methods. Complete the table by inserting information relevant to your specific session outcomes and administrative requirements. Once the table is complete, you are well on your way to making an informed decision about the training delivery method that is most suited to your situation3.

|  |  |  |  |
| --- | --- | --- | --- |
| Type of delivery | Benefits | Drawbacks | Who’s doing it this way? |
| **Face-to-face (F2F)** | Interpersonal contact, builds relationships, social engagement opportunities.Good for people who prefer traditional training approaches. | Travel required.Room size can limit total number of participants.Back-filling of staff who are off work at the same time.Success depends on leaders’ content presentation and process facilitation skills. | Record what your sister organizations across Ontario are using for each delivery method and why. You may find something pre-packaged that other organizations recommend or discover a resource that is nearby. |
| **e-learning**3 | Can be done at a distance; compensates for limited room size.Learners can access anywhere, anytime.Fosters interactivity through online forums, connected communities.Cost savings on time and travel. | Requires appropriate technology and skills, reliable e-systems that are maintained.Technology can be intimidating for some. |
| **Blended learning** | Can leverage the best learning methods for everyone’s benefit: convenience of e-learning + F2F interaction with peers and trainers. | See above for F2F and e-learning. |

For templates, see [Step 3 in Appendix A](#step3template).

Step 4: Structure the Agenda and Activities

Once you have determined the learning outcomes in Step 2 and the best way to deliver the session in Step 3, the next challenge is to map out a basic draft agenda according to the allotted time frame. Agenda elements to include are the pre-session preparation, the session itself (opening, training, closing), and post-session follow up. A basic draft agenda for a half-day face-to-face or e-learning session is provided in the templates below.

Once the draft agenda timeframes are estimated, you can focus on shaping the activities and their logistics related to each learning outcome.

Pre-session

Pre-session preparation can enable learners to participate fully in the session. Develop an attractive pre-session package that participants look forward to completing in advance of the session. Items to consider for the covering note and package are shared in the templates section below.

The Session

The session begins where the pre-session activities left off. If your pre-session package was limited to a welcoming note and agenda, think about how and when you will distribute other materials related to the session, for example, a list of participants, resources, etc.

There are three components to the session, no matter how it is delivered (face-to-face, online, etc.): the opening, the body or learning activities, and the closing.

Opening the Session

The opening sets the tone for participants to engage in the session and also with each other. Items to consider to get your session off to a good start are shared in the templates section below.

The Body of the Session: Learning Activities

The purpose of activities in the body of the session is to achieve the learning outcomes you identified, in ways that appeal to different participation styles and delivery methods, within the time frame allotted in your draft agenda. While you don’t need to be an expert in how adults learn, an overview of three key points can be helpful to ensuring that people are actively engaged in learning: taking in information, approaching the learning experience, and making sense of that experience.

* **Taking in information** – Some people prefer to take in information visually; some prefer to hear information rather than see it; and some are more kinesthetic and like a hands-on approach. The challenge for both online and face-to-face agenda activities is to include a range of pictures, displays, films, spoken words, sound and items to hold or make4.
* **Approaching the learning experience** – People approach the learning experience in different ways as well: some prefer to watch others and reflect on what they have observed (reflective observation), while others like to jump right in and do it themselves (active experimentation). The challenge for both online and face-to-face agenda activities is to include opportunities for participants to approach some of the learning activities in either way: watching and reflecting, and jumping right in5.
* **Making sense of that experience** – To transform their experience into something useful, some people prefer thinking, analyzing or planning (abstract conceptualization); others prefer feeling the concrete, tangible qualities of the world (concrete experience). The challenge for both online and face-to-face agenda activities is to include opportunities for participants to make their learning useful in either way: thinking and analyzing, and feeling aspects of their concrete worlds.

The templates below contain a list of different activities that reflect the above key points5. You can consider each activity according to its benefits, how participants take in information and approach learning, to transform their experience into something useful. One size does not fit all – people learn in very different ways! Your training activities need to reflect these differences.

Closing

Carefully protect enough time in the agenda for the session closing. Bringing closure to a session will help to reinforce participants’ learning and its transition into the workplace. Items to consider for your session closing are shared in the templates section below.

Post-session Follow Up

Post-session follow up with participants can help to reinforce and evaluate the session outcomes. Some things to consider to reinforce this knowledge transfer are shared in the templates section below.

For templates, see [Step 4 in Appendix A](#step4template).

Step 5: Construct the Evaluation

Early on when designing the session, you can think about how the success of the event will be evaluated. Evaluation formats can include surveys, demonstrations and comparisons of pre- and post-training performance. They can range from basic to complex, whether on paper or electronic.

As a first step in sorting through the maze of options, check to see if your organization has any standard templates. You may be able to start with the templates provided and adapt one to your needs. Identify what your stakeholders will want to receive in a summary of the feedback – hosts, funders, champions, clients, participants, etc. – then formulate questions that will capture that information. In general, keep things as brief and straightforward as possible.

Session Evaluation

For the post-session evaluation, some key questions to consider include:

* How was their experience during the event (e.g., what parts of it did they like, what would they suggest be done differently next time)?
* What skill or knowledge do learners say they have gained?
* What key messages are they taking away?
* What plans do participants have to apply their learning? (When someone commits to something concrete, they are more likely to carry it out.)

Evaluating Knowledge Transfer

When participants are back at work after a period of time, ask:

* How has their new knowledge or skills transferred into performance?
* What are they doing differently?

For templates, see [Step 5 in Appendix A](#step5template).

Step 6: Manage the Event Logistics

Logistics and the inherent details may seem overwhelming when you are organizing an education event, whether face-to-face or electronic. When done well, how you manage logistics can play a significant role in learners’ engagement. You can customize the checklists included in the templates for the topics listed below so that your event runs without logistical let-downs6.

* Date/Time
* E-learning/Webinar
* Health/Safety/Security7
* Layout/Venue
* Technical Support
* Videoconferencing

Addressing Your Worries

***So Now You’re Ready, Why Worry?!*** Use this chart to address some of the most common worries of providing adult education events 6, adapted p. 139 – 141. Just circle your worry.

| Your worry is… | Try this… |
| --- | --- |
| Fear of making a mistake | Be well prepared. Breathe deeply.Acknowledge the fear (to yourself!). It keeps you on your toes. |
| Credibility | Don’t apologize.Have an attitude of a professional who is there to help learners.Share personal/professional background with participants. |
| Diverse learning styles | Practice techniques in advance to deal with a range of learning styles.Know your audience.Include a range of activities in the agenda. |
| Participation | Ask open-ended questions for quiet learners.Plan small group activities. Invite participation. |
| Timing | Plan well – keep your agenda close by.Post the time for each activity where everyone can see.Plan time for questions. |
| Adjusting the agenda | Request feedback and be willing to adjust.Be prepared to redesign during breaks or on the spot.Know group needs. |
| Questions | Anticipate questions.Repeat or paraphrase learners’ questions to ensure clarity.Admit if you don’t know, then offer to find out. |
| Equipment | Practice with equipment and technology in advance.Arrive early for an additional run through. Have a back-up plan. |
| Feedback | Solicit informal feedback.Think about what you would do differently next time.Observe other trainers and educators. |

For templates, see [Step 6 in Appendix A.](#step6template)

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Resources

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Appendix A – Templates

Step 1: Explore the Requirements

Determining the Target Audience

| Characteristic | Example | Your Project |
| --- | --- | --- |
| Anticipated/ideal group size | Less than 20, 20-50, 50-100, more than 100 |  |
| Sector | Developmental Services, Justice, Mental Health |  |
| Occupation/Role | Clinicians, family members, managers, students |  |
| Geographic range | Local, regional, provincial |  |
| Education level | High school, college, university, post-graduate |  |
| Level of experience in the topic | Beginners, some experience, very experienced |  |
| Previous training related to the topic | Recent, within 5 years, more than 5 years ago |  |
| Main challenges learners face related to the topic | Long-standing, recent |  |
| Learners’ feelings about attending training | Excited, uncertain, not interested |  |
| Context(s) in which learners work | Environmental, economic, legal, political, social |  |

Assessing the Learner’s Needs

**Review Related Documents – Questions/Tasks:**

* What are some key documents that everyone should review, e.g., within the agency, ministry, etc.?
* What information or data would inform participants about current challenges, opportunities?
* What facts or definitions do participants need to ensure discussions are based on common understanding?
* Do we need a glossary of terms and abbreviations so people have a common understanding of them?

**Ask Potential Participants Directly:**

**Survey Template:**

[*INSERT: Purpose of the training session*]

1. For the following topics about [*INSERT: main focus of the training*]:

| Which of the following topics would you be interested in learning more about?(Check all that apply) | Why is this of interestto you? | Provide an example of how you might apply this in your work | Rate your ability on this topic on a scale of 1 (low) to 5 (high) |
| --- | --- | --- | --- |
| □ | [*INSERT: options, add/remove rows as needed*] |  |  | 1 2 3 4 5 |
| □ |  |  |  | 1 2 3 4 5 |
| □ |  |  |  | 1 2 3 4 5 |
| □ |  |  |  | 1 2 3 4 5 |
| □ |  |  |  | 1 2 3 4 5 |
| □ | Other (please specify): |  |  | 1 2 3 4 5 |

1. If any of these topics are not important to you in your job, please tell us why.

Clarifying Budget Requirements

Some things to consider include any specific directions from the person who made the request? For example:

* What funds can you access to organize the event?
* What human resources can you access?
* Are there any specific time constraints to take into consideration?
* Any other limitations or considerations that you are aware of?

Some expenses to anticipate include:

|  |  |  |
| --- | --- | --- |
| Expense Item | Estimate | Actual |
| Venue rental | $ | $ |
| Session promotion – flyers, social media, etc. | $ | $ |
| Handouts, worksheets – printing | $ | $ |
| Refreshments, breaks | $ | $ |
| Meals | $ | $ |
| Audiovisual equipment | $ | $ |
| E-learning platform, support | $ | $ |
| Speaker fees, honoraria | $ | $ |
| Travel and/or parking costs (speakers/participants) | $ | $ |
| Accommodation costs (speakers/participants) | $ | $ |
| Backfill for replacing personnel | $ | $ |
| Other | $ | $ |
| TOTAL: | $ | $ |

Step 2: Use an Outcomes-Based Design

Designing the Session2

|  |  |  |  |
| --- | --- | --- | --- |
| IntendedOutcomes | AssessmentTasks | ProcessSkills | Conceptsand Issues |
| *What do learners need to be able to* ***DO*** *“in their work” that we’re responsible for addressing “in the training session”?**For example, post-session performance.* | *What will learners do in the training to demonstrate* ***evidence*** *of what they can do?**For example, in-session evidence of performance – assessment of tasks.* | *What* ***skills*** *must the learner master to demonstrate what they can do?**For example, specific acts, ability to do tasks – process skills.* | *What must the learner* ***understand*** *to demonstrate what they can do?**For example, specific facts, patterns, values, motivations – concepts and issues.* |
|  |  |  |  |

Step 3: Consider the Delivery Method

Comparing Delivery Methods

| Type of delivery | Benefits | Drawbacks | Who’s doing it this way? |
| --- | --- | --- | --- |
| **Face-to-face (F2F)** |  |  |  |
| **e-learning** |  |  |  |
| **Blended learning** |  |  |  |

Step 4: Structure the Agenda and Activities

Once you have determined the learning outcomes in Step 2 and the best way to deliver the session in Step 3, map out a draft agenda according to the allotted time frame4,5.

**Learning Outcomes**:

* What learners will do differently after the session.

**Pre-session Preparation:**

* What participants will review well in advance of the session.

|  |  |  |
| --- | --- | --- |
| Time | Activity | Notes to Remember |
| 8:45 | Gathering, Refreshments |  |
| 9:00 – 9:15 | Opening: | Options if time is running long or short: |
| 9:15 – 10:30 | Activities that address Learning Outcomes: |  |
| 10:30 – 10:45 | Break |  |
| 10:45 – 12:00 | Activities that address Learning Outcomes: |  |
| 12:00 – 1:00 | Lunch |  |
| 1: 00 – 2:30 | Activities that address Learning Outcomes: |  |
| 2:30 – 2:45 | Break |  |
| 2:45 – 3:45 | Activities that address Learning Outcomes: |  |
| 3:45 – 4:00 | Closing: |  |
| 4:00 | Adjourn |  |

**Post-session Follow-up:**

* What participants will review after the session to reinforce the learning outcomes

Pre-session

Items to consider for the covering note and package:

* Thank participants for registering
* Event goals and agenda
* A note from a sponsor or champion about the relevance of the session and how the outcomes could affect the future
* List of participants
* Provide clear instructions and indicate an estimation of how much time reviewing the package should take
* Offer delivery options for documents (e.g., mail hard copies, email, website download)
* Invite participants to consult with colleagues about shared perspectives related to the event goals
* Include a one paragraph biography of facilitators or presenters
* Provide other resource links related to the session topics: websites, media, an online video clip, review of a slide deck.
* Tips:
* Ensure the information is sent out far enough in advance so individuals will have a reasonable amount of time to complete it.
* Provide session location details so they can make their travel arrangements.
* Clarify any financial support.
* Have a process for participants to identify if they haven’t received the package and/or can’t access it.
* If completion is mandatory, set up a process to monitor this.
* Recognize that participants have limited time, so ensure tasks have an obvious link to the outcomes and are worth the time/effort required.

The Session

**Opening the Session**

To ensure your session gets off to a good start, think about how you will incorporate the following into your opening:

* Welcome the participants; thank them for attending
* Provide historical context that gave rise to the session, e.g., events, challenges, opportunities
* Link potential benefits of the training for the future of participants (what’s in it for me?), the organization, the community
* Introduce yourself and any other resource people
* Opening remarks from the sponsor or champion
* Provide an overview of the agenda and goals or outcomes
* Lead participants through an activity where they briefly introduce themselves and identify one thing they hope to take away from the session 6, p. 69, other questions for opening a session
* Establish norms for working together
* Review logistics and housekeeping items
* Any other things you want to include

**The Body of the Session: Learning Activities**

The following is a list of different activities you may want to use. You can consider each activity according to its benefits, how participants take in information and approach learning, to transform their experience into something useful. One size does not fit all – people learn in very different ways! Your training activities need to reflect these differences5.

| % Agenda | Activity | Benefit | Visual, Auditory, Kinesthetic | Learning ApproachRO, AE\* | Transform ExperienceAC, CE\*\* |
| --- | --- | --- | --- | --- | --- |
|  | Listening to speakers | Deliver content-rich monologue, some reflection | V, A | RO | AC |
|  | Question and Answer (Q&A) | Individual interaction | A | RO | AC |
|  | Small group discussions (with group participant exchange) | Many can discuss thoughts, feelings, facts, observations from a variety of perspectives; build on each other’s contributions | A | RO, AE | AC, CE |
|  | Plenary discussion | Individual interaction | A | RO | AC |
|  | Reflection | Surfaces individual thoughts, feelings, values; can compare new input to previously held views | V, A | RO | AC |
|  | Data interpretation | Critical thinking | V, K | AE | AC |
|  | Decision making | Focuses on what to do next | V, A | AE | CE |
|  | Watching media | Content-rich monologue, some reflection | V, A | RO | CE |
|  | Reading text | Content-rich monologue, some reflection | V | RO | AC |
|  | Simulations, model building | Sparks active experimentation; surfaces unresolved issues | V, A, K | AE | CE |
|  | Brainstorming | Surfaces ideas without judgment | V, A | AE | CE |
|  | Working groups | Many contribute to an applied discussion | A | AE | CE |
|  | Case studies | Many contribute to an applied discussion; develops problem-solving skills; writing notes can help people to make sense of ideas or to remember key points  | V, K | AE | AC |
|  | Practice contingency “what if” scenarios | Can practice real-life situations in low-risk setting | A, K | AE | CE |
|  | Summarize progress/ results to date | Enhances critical thinking | V, A | AE | AC |

\*RO – reflective observation; AE – active experimentation

\*\*AC – abstract conceptualization; CE – concrete experience

* Tips:
* Confirm the variety of activities in your agenda to keep all participants engaged. This encourages active participation and promotes ownership of session outcomes.
* What activities look most/least interesting for your group? Most/least challenging?
* Check specific adaptations to the online learning environment5.
* Ensure a learning outcome is the focus of each part of the agenda.
* Identify activities that will address each outcome and different participants’ learning preferences.
* Check that the time allocations are reasonable, e.g., small group discussions are more inclusive and interactive, and may take longer than a large group presentation.
* Arrange for human and technical resources, e.g., expert presentations by internal or external speakers (face-to-face, videoconference) who can explain complex concepts in a compelling way.
* Create materials that support learning at each stage of the session and afterwards in the workplace; determine how they will be distributed.
* Identify who is the best person to present/facilitate each piece (e.g., expert who can explain complex concepts in a compelling way for content sections, someone with good facilitation skills for group work).
* Build in “flex” points where you can change formats or cut something out (e.g., provide it as a handout rather than presenting) to catch up if running over time.

**Closing:**

Think about which of the following will be most important for your session closing:

* Summarize key themes in the training session.
* Provide a warm and heart-felt thank you to everyone involved.
* Motivate participants to apply their learning, e.g., invite participants to share a key take-away or a commitment to how they will apply their learning in their work.
* Indicate how organizers will follow through to support participants’ transfer of learning, whether through reminders, references, action plans or tracking.
* Provide evaluations for completion with enough time so people will put some thought into it instead of rushing to leave. Ask about their experience of the session and how they plan to apply their learning in the workplace.

Post-session Follow Up

Some things to consider to reinforce the participants’ knowledge transfer include:

* What information mentioned during the session needs to be followed up, updated?
* Determine the amount of time after the main session when participants will be expected to incorporate their learning into their work (one week to one month).
* What format for contacting participants will ensure a good response rate?
* How will we reinforce learning, e.g., reinforcing key concepts and/or distributing new resources?
* How will we evaluate the impact of the training on work, e.g., if they have been able to achieve the learning outcomes? Some key questions to consider for participants include:
* What opportunities have you had to apply your learning?
* What barriers have hindered applying your learning?
* To what extent have you achieved any plans or commitments you made at the end of the session?
* How could the session have better prepared you to improve your on-the-job performance?

Trainer’s Work Plan

This can be a useful way to map/track the elements discussed in this section.

**Pre-session**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Pre-work Item** | **What are the participant’s instructions?** | **When will it be distributed?** | **How will it be distributed?**  | **When is it due?** | **How will completion be tracked?** |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

**The Session**

| **Start/End Times** | **Total Length** | **Item** | **Who/Resources** | **Description/Notes** | **Facilitation Techniques** |
| --- | --- | --- | --- | --- | --- |
| Opening of the Session |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
| Main Body of the Session |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
| Closing of the Session |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

**Post-session Follow Up**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Follow-up Item** | **What are the participant’s instructions?** | **When will it be distributed?** | **How will it be distributed?**  | **When is it due?** | **How will completion be tracked?** |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

Step 5: Construct the Evaluation

Some evaluation templates other groups have found helpful are provided below; adjust as needed to suit your specific situation.

Session Evaluation – Sample #1

**Evaluation Feedback [Insert Session Name] – [Insert Date]**

1. In your opinion, to what extent did we achieve the goals of the session? (Circle a number)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **1****Poor** | **2** | **3** | **4** | **5****Excellent** |
| Goal #1: | 1 | 2 | 3 | 4 | 5 |
| Goal #2: | 1 | 2 | 3 | 4 | 5 |

1. What I found most useful about the session:
2. My words of advice for future sessions (if any are planned):
3. Something I wanted to say but didn’t:
4. Other comments?

**Thanks for your participation! Your comments will be collated.**

Session Evaluation – Sample #2

**Feedback on [Insert Session Name] – [Insert Date]**

* 1. What did you want most out of this program when you signed up?

Did you get what you wanted? Yes \_\_\_ No\_\_\_

Please explain:

* 1. Overall, how well did you like the program? (Circle a number.)

 1 2 3 4 5

Not at All Very Much

Please explain why you chose that number:

* 1. What will you do to apply your learning in your work?
	2. Would you recommend this program to a colleague? Yes \_\_\_ No \_\_\_

Why/Why not?

* 1. One message to the organizers:
	2. Other comments?

*Thanks!*

Evaluating Knowledge Transfer

**Evaluation Feedback [Insert Session Name] – [Insert Date]**

1. What one or two things did you learn that you are using in your work?

1.1

1.2

1. What did you learn that you shared with others in your work?
2. When applying your learning in your work:
* What one thing helped you the most?
* What one thing hindered you the most?
1. How has your learning improved the quality of life for the people you support?
2. Other comments?

**Thanks for your time to complete these questions!**

Step 6: Manage the Event Logistics

Create your own list or use the templates provided, adjusting as needed. Elements to consider include:

* [Date/Time](#datetime)
* [E-learning/Webinar](#elearning)
* [Health/Safety/Security](#heathsafety)7
* [Layout/Venue](#layoutvenue)
* [Technical Support](#techsupport)
* [Videoconferencing](#videoconf)

|  |  |  |
| --- | --- | --- |
| √ | DATE/TIME – Items | Notes |
| Determining the best day and time to hold an event is important, because it can determine people’s attendance; some things to consider include: |
|  | 1. Do our planned date(s) conflict with other major events or holidays?
 |  |
|  | 1. Is there a day of the week and/or time of day that is better for our audience?
 |  |
|  | 1. Are there any things we should consider in terms of how long the session is, breaking it up into multiple sessions, spreading days out, etc.
 |  |

| √ | E-LEARNING/WEBINAR – Items | Notes |
| --- | --- | --- |
| Which of these items do we require? Who will supply what? |
|  | 1. Computers
 |  |
|  | 1. Cables
 |  |
|  | 1. Telephones, speaker phones, mobile devices
 |  |
|  | 1. Platforms, pre-existing software, courseware
 |  |
|  | 1. Headsets
 |  |
|  | 1. Webcam
 |  |
|  | 1. Scanner
 |  |
|  | 1. Multimedia
 |  |
|  | 1. Hyperlinks
 |  |
|  | 1. Accessible website
 |  |
|  | 1. Local network capacity
 |  |
|  | 1. High-speed internet access
 |  |
|  | 1. Other computer system requirements
 |  |
|  | 1. Human resource needs (e.g., who will be facilitating, managing technology behind the scenes, reviewing/collecting responses/data?)
 |  |

| √ | HEALTH, SAFETY AND SECURITY – Items | Notes6, adapted |
| --- | --- | --- |
|  | 1. What healthy, eco-friendly options does the facility provide? For example:
 |  |
|  | * 1. Menus of healthy, environmentally-friendly and appealing food, incorporating local, seasonal and organically grown foods wherever possible (no preservatives on salad bar ingredients)
 |  |
|  | * 1. Markers that are nontoxic and unscented
 |  |
|  | * 1. Flipchart pads and handouts made of recycled paper
 |  |
|  | * 1. Beverages, condiments and other food items served in multiuse containers (such as pitchers and containers) rather than one-time, individual packages
 |  |
|  | * 1. Pitchers of water and glasses on tables instead of plastic bottles
 |  |
|  | * 1. Recyclable food and beverage packaging
 |  |
|  | * 1. Bins in the meeting rooms for recyclable materials
 |  |
|  | * 1. Reusable beverage mugs, glasses, cutlery, dishware, and linens—no disposable items such as paper napkins or cups
 |  |
|  | * 1. Notice about removing items such as nuts and scents due to allergies
 |  |
|  | * 1. Fair trade beverages
 |  |
|  | * 1. Leftover food donated to a local food bank or soup kitchen or composted
 |  |
|  | * 1. Directions for using public transit
 |  |
|  | * 1. Energy-efficient lighting
 |  |
|  | 1. How is room temperature controlled? Where are the lighting and heating controls? Can seating be arranged to avoid drafts?
 |  |
|  | 1. Can the facility recommend some interesting places where participants will feel comfortable getting some fresh air?
 |  |
|  | 1. How safe and secure is the location: can participants walk and drive safely?
 |  |
|  | 1. Where can people park their cars? Is the area lit and patrolled regularly?
 |  |
|  | 1. If safety is an issue, what type of security should we have in place for participants’ comfort?
 |  |
|  | 1. Will participants be able to leave belongings in the meeting room if away at lunch?
 |  |
|  | 1. For a multi-day session, is the room being used by anyone else in the evenings when we aren’t there? If not, can materials be left in the room?
 |  |
|  | 1. When are personnel available to open and to lock up the location, for example, at meals, breaks and end of day? Or are we able to lock the room up when we aren’t there?
 |  |
|  | 1. Will people not in our session be able to walk around near the rooms we are using?
 |  |
|  | 1. If breaks and lunch are in the hall outside the main room, how does the facility ensure that our supplies are not used by others?
 |  |
|  | 1. Other:
 |  |

| √ | LAYOUT/VENUE – Items | Notes6, adapted |
| --- | --- | --- |
|  | 1. Does the location have the right sizes and types of space and amenities required to accommodate the agenda and number of participants?
 |  |
|  | 1. Will it support the desired ambience for the session?
 |  |
|  | 1. Will it reflect the key messages we want to send?
 |  |
|  | 1. Is the facility accessible for participants with different abilities: physical, developmental or intellectual, psychiatric or economic?
 |  |
|  | 1. How convenient is the location in terms of travel?
 |  |
|  | * 1. Will we need to provide transportation to and from the location, for example, from airports or from train and bus stations?
 |  |
|  | * 1. Is public transportation available? At what cost?
 |  |
|  | * 1. How much time will it take participants to travel between the site and their workplace/home/hotel?
 |  |
|  | * 1. Is there a cost for parking?
 |  |
|  | * 1. Do we have detailed directions to share with our participants?
 |  |
|  | 1. What, if any, food/refreshments will be provided?
 |  |
|  | * 1. Does our menu include sufficient vegetarian options?
 |  |
|  | * 1. Have we checked with our participants around any allergy issues?
 |  |
|  | 1. Are other activities taking place nearby at the same time that might be noisy or distracting?
 |  |
|  | 1. What are the venue policies for items such as signage? Are the opening and closing hours of various buildings an issue?
 |  |
|  | 1. What special features, such as recreational opportunities, entertainment options and hospitality suites, are available on site or nearby?
 |  |
|  | 1. Are there day-care options in the building or nearby?
 |  |
|  | 1. Is there an alarm code for access?
 |  |
|  | 1. Where are the main entrance and exit, washrooms, fire escapes?
 |  |
|  | 1. How does our site handle nutrition and stretch breaks, for example, in the room, outside the room, kitchen available, bring-our-own?
 |  |
|  | 1. What seating options (chairs, table size/shape, room setup) do we have for a group this size?
 |  |
|  | 1. Are there adjustable chairs for people with back problems?
 |  |
|  | 1. Other:
 |  |

| √ | TECHNICAL SUPPORT – Items | Notes6, adapted |
| --- | --- | --- |
| Which of these items do we require? Who will supply what? Do we need to have tech support on site or can we manage on our own? What is the back-up plan if something goes wrong? |
|  | 1. Blackboard, whiteboard, flipcharts (stands, paper, Post-it pads) – number and locations
 |  |
|  | 1. Projection equipment, screen(s), monitors, televisions
 |  |
|  | 1. Cameras and related supplies
 |  |
|  | 1. Telephones, speaker phones, mobile devices
 |  |
|  | 1. Computer(s)/laptop(s), printer(s)
 |  |
|  | 1. Internet connection
 |  |
|  | 1. WiFi for participants
 |  |
|  | 1. Displays
 |  |
|  | 1. Extension cord(s), three-way plug adapter
 |  |
|  | 1. Batteries; extra batteries for all devices
 |  |
|  | 1. Extra projector bulbs
 |  |
|  | 1. Lighting: when, where and who will adjust it
 |  |
|  | 1. Chalk, markers (water-based, easy-to-see, unscented, various colors)
 |  |
|  | 1. Media players and recorders
 |  |
|  | 1. Microphones: specify type (e.g., lapel, head, cordless, table), number and locations
 |  |
|  | 1. Pens and pencils: types and numbers
 |  |
|  | 1. Podium
 |  |
|  | 1. Pointer for highlighting items on screens
 |  |
|  | 1. Portable/electronic storage for reports and documents created on site
 |  |
|  | 1. Power bar
 |  |
|  | 1. Resource tables
 |  |
|  | 1. Riser for speaker/panel table
 |  |
|  | 1. Specified font size for presentation materials
 |  |
|  | 1. Table or stand for projection equipment
 |  |
|  | 1. Other:
 |  |

| √ | VIDEOCONFERENCING – Items | Notes |
| --- | --- | --- |
|  | 1. Host site/system booked?
 |  |
|  | 1. Does the presenter need a practice run through?
 |  |
|  | 1. What is the back-up plan if there are issues with the presenter’s host site?
 |  |
|  | 1. Who can be on-site with the presenter to provide technical support?
 |  |
|  | 1. Who can the presenter contact day-of for technical support if something goes wrong?
 |  |