Learning & Leadership Department Education and Training: Development and Delivery Process

The Learning & Leadership training/education planning process, developed and refined for the past 25 years, includes several key steps, which planners should conduct in the order outlined below.

Frequently, we get asked how to assess existing programs and distinguish good from bad training and education. It's difficult to pick up a curriculum or program outline, without seeing the actual training or education, and determine whether it's good versus bad. The question itself implies an all or nothing conclusion while most programs contain both positive and negative attributes. There are some indicators of quality to consider, however, when reviewing training or education materials. Each step described below includes a section called "What to Look For," to assist in reviewing existing curricula to assess their quality.

- **Needs Assessment.** We want to know, from many different perspectives, what the learners/target audiences most need to learn. Usually, if time and financing permit, we convene a representative group of 12-14 persons that spends first 3-5 hours of a 1.5-2-day meeting focusing solely on what the target audience needs to learn within the rough time frame possible for the training. We can conduct needs assessments by telephone for shorter programs or when an in-person meeting is not feasible. The different perspectives on the planning/needs assessment team ensure a thorough description of the training needs from multiple perspectives. After indentifying potential topics, part of this time is used to combine related ideas and determine the highest priority topics for the training during the time allocated. ***What to Look For:*** A training curriculum normally will not specify or explicitly list the training needs. However, these are embedded within the training objectives as well as the content that's outlined in the various learning activities (to achieve the objectives). So you

should be able to look at the objectives as well as learning activities and see what the program planners thought was most important.

- **Learning Objectives.** Once training needs have been fully identified and the priorities determined, we always write learning objectives, first for the program as a whole and then for each program segment (which could range from 30 minutes to a half day). These learning objectives must appeal to and inform the learners what to expect as well as provide guidance to program faculty (instructors, presenters, etc.) about where they need to focus their efforts. Although we want to focus on changing attitudes, cognition (understanding), and behavior, we always write the objectives focused on behavior, so that we can observe during the training whether objectives are being met and compare what learners said they learned to see if we met our objectives. So, as a simple example, we would say "As a result of this segment, learners will be better able to: discuss the primary reasons a sexual assault victim is reluctant to report the crime." We could say learners will "understand, know or learn" but we have no way of measuring cognition; yet, we will know that the behavioral objective was achieved because we can engage in a discussion with the learners during or after the training to see if they can articulate the reasons a victim is reluctant to report. Objectives must be measurable, clear and concise, and achievable within the time allowed for the training. We always analyze and discuss the objectives to determine whether they satisfy these criteria. ***What to Look For:*** Some training outlines will omit objectives but more frequently they will list the objectives in vague terms that do not allow for assessment. If you see objectives that are too general or that say "participants will 'learn', 'understand', 'know'" or that use other vague terms, be wary. If you see a list of learning activities or a content outline that does not relate to objectives, it is a red flag.

- **Learning Activities.** Only after we have thoroughly assessed the needs, narrowed the topics based on needs and time constraints, and drafted clear, measurable, and achievable objectives, can we turn to development of the learning activities. Common activities are lecture, cases studies, small-group activities, role-plays, demonstrations, etc. In framing learning activities, we rely on experiential learning

theory and practice, which incorporates experienced-based learning principles from highly-respected 20th century education scholars. Essentially, in a nutshell, experiential learning depends on participants' sharing of their professional or personal experiences during the training in order to change their future behavior (as well as attitudes and cognition) when faced with similar circumstances. Participants' experiences are brought forward through activities that engage them in discussions and experimentation with new, more innovative techniques; peer to peer learning, guided by expert faculty/facilitators, underlies this learning format. ***What to Look For:*** Many trainers view themselves as experts who are present to impart their knowledge to the learners; many so-called experts focus on their needs more than learners' needs. If you notice that a training outline includes long periods of lecture (or panel presentations, which are usually nothing more than serial lectures), then be wary. We do not permit more than what we call mini-lectures in our programs—15 to 20 minutes maximum. Also, look for a variety of learning activities within a training to ensure that the program reaches all different learning styles (varied, preferred ways of learning) that are present in every audience. You will want to see many different learning activities and find a connection between the activities and the learning objectives. Each activity should also conclude with a highlight or summary of the key learning points from the segment.

- **Selection and Use of Faculty Team.** In experiential learning, it is important to select a faculty team that represents major perspectives regarding what the learners need to learn and includes representation from the group that is receiving the training. In our workshops for judges, for example, we use a faculty team that includes 3 or 4 judges, 2 attorneys/victim advocates, 1 public defender (for balance), a child development expert, and an expert on culture (which impacts not only the appropriateness of services for victims and remedial measures for violence perpetrations but also the effectiveness of the courts themselves). Faculty team members must receive training (see next bullet below), be present for the entire program, and work as a cohesive, respectful team. Faculty members representing the audience that receives the training (in this case judges) lend the credibility and experience that is essential for the learners to relate the training to their own work

and to examine their beliefs and practices. ***What to Look For:*** Outside trainers (without representing the group to be trained), working alone, have difficulty using the content of their training to change the work experiences of the learner audience. Individual trainers also have difficulty sustaining longer programs. Look for trainers who want to form a training team (small or large depending on financial support) that can represent diverse perspectives and that include peers from the learning audience, even if the role of the peers is somewhat limited initially until their expertise grows. If finances permit, also train peer facilitators (who are already trained in the content topics) to facilitate the learner audiences during small-group activities.

- **Faculty Training (training of the trainers).** We require that potential faculty for all of our training programs participate in a 2.5-3 day faculty training program. At that program, faculty members discuss the various preferred ways of learning, based on experiential learning theory. Faculty also learn the program design process we have outlined for you here, practice developing a short training segment, and then practice delivery of the segment with critique by their peers and the training of the trainers faculty. If we have developed a specific curriculum we want the trainers to teach, we will have them practice with pieces of that curriculum; this sometimes helps us improve the curriculum while providing a preview of how particular trainers will perform in the actual training programs. We tend to use only 60-70 percent of the faculty who are actually trained, because it becomes apparent during the training process that some persons are not appropriate faculty. ***What to Look For***: It is always a fair question to ask who developed a curriculum or program outline and what kind of training the faculty (presenters) have received to deliver the training. Many trainers do not use a systematic, learner-based process to develop training. Frequently, they prepare a bunch of PowerPoint slides and memorize a lecture based on a content outline of the subject matter, without engaging participants more than in a limited question-answer session based on the lecture. A few persons can lecture eloquently for some length of time; this skill is very rare however and does not satisfy participants' needs to apply the information to their own work in the context of their own experiences.

- **Evaluation.** Training evaluation is crucial. Self-reporting, pre- and post-training surveys can be helpful when combined with evaluations during the programs. Based on work with evaluation experts, our programs no longer ask for “ratings” of instructors based on numeric scales of good and bad. Instead we ask (1) What have you learned, (2) How will you apply it when you return to work, and (3) What should we do differently next time we provide this program? Post-training surveys should attempt to measure whether the objectives were achieved through changes in learner behavior as well as attitudes and understanding. More extensive, complex, evidenced-based evaluation is possible as well but it requires adequate financial support to engage an experienced researcher to employ accepted methods. ***What to Look For:*** Program planners/staff should participate as directors/choreographers of well-designed curricula, providing guidance to faculty as each program progresses; during and after the programs, planners can confer with faculty to determine what worked well and what needs revision. Evaluations that rate instructors tend to promote popularity contests and focus on a particular performance of the faculty rather than whether the learners changed their behavior or whether the objectives were achieved. Look for evaluations that connect results of the training to the objectives for the learners.

Conclusion

We hope this information helps you focus on the primary components of an effective training. We have used these principles and the design process to create training/education programs for every type of professional as well as members of the community, and it works for any setting. The key is to follow the steps in order, completing each one before moving to the next. Ultimately, the learning objectives drive the presentation of content in every training; there is never enough time, and the objectives tell faculty where to focus while letting the learners know what to expect.

Resources

This method is based in Experiential Learning Theory (ELT) and formulated in accordance with propositions shared by 20th Century Scholars.[1] The bases are:

1. **Learning is a process not an outcome.** To improve learning, the primary focus should be on *engaging participants in a process* that best enhances their learning—a process that includes feedback on the effectiveness of their learning efforts. Education is conceived as a continuing reconstruction of experience…the process and goal of education are one and the same thing (Dewey).
2. **All learning is *relearning*.** Learning is best facilitated by a *process that draws out participants' beliefs and ideas* about a topic so that they can be examined, tested, and integrated with *new, more refined ideas*.
3. **Learning requires resolution of conflicts between dialectically opposed modes of adaptation to the world.** *Conflict, differences, and disagreement* drive the learning process. In the process of learning, one moves back and forth between *opposing modes of reflection and action and feeling and thinking*.
4. **Learning is a holistic process of adaptation to the world**. It is not just the result of cognition but involves the integrated functioning of the *total person—thinking, feeling, perceiving, and behaving*. It encompasses other specialized models of adaptation from the scientific method to problem-solving, decision-making, and creativity.
5. **Learning results from synergetic transactions between the person and the environment.** Stable and enduring patterns of human learning arise from consistent patterns of transaction between the individual and his or her environment. The way we process the possibilities of each new experience determines the range of choices and decisions we see. The choices and decisions we make to some extent determine the events we live though, and these events influence our future choices.

[1] Kolb, Alice Y. and Kolb, David A., "Learning Styles and Learning Spaces: Enhancing Experiential Learning in Higher Education," Academy of Management Learning & Education, Vol. 4, No. 2 (Jun., 2005), pp 193-212, at p 194. http://www.jstor.org/stable/40214287.

Thus, learning occurs through the equilibration of the dialectic processes of *assimilating new experiences into existing concepts* and *accommodating existing concepts to new experience* (Piaget).

6. **Learning is a process of creating knowledge**. ELT proposes a constructionist theory of learning whereby *social knowledge is created and recreated in the personal knowledge of the learner*. This stands in contrast to the "transmission" model on which much current educational practice is based, where pre-existing fixed ideas are transmitted to the learner.

Additional Works Consulted:

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Taylor and Marienau, *Facilitating Learning with the Adult Brain in Mind* (2016).

Waldrop and Conner, *Curriculum, Program, and Faculty Development: Managing People, Process, and Product* (1994).