The Trainer Academy
WORKBOOK

https://nancybacon.com/hanotraineracademy

Nancy Bacon
CONSULTING

revolutionizing the role that learning plays in the nonprofit sector

Get ready for The Trainer Academy

Here is advance work to help us dive into instructional design in our next session. Example information is provided in gray. Add as much detail as possible.

The topic of your workshop Boards	**Describe typical individuals who attend this training** Board members and some nonprofit staff

Name an action that you hope these individuals can take after your training
Board members will raise money for the organization with confidence.

Describe the action
Board members will have the words to ask people for money. They will recruit people to attend events. They will be able to explain to a new board member why raising money for their organization is important.

What would we see if they did this action?	**What would we hear?**
Board members would visit with friends, potential donors, funders, or others who might contribute. They would be seen at events. They would appear comfortable with some aspect of raising money.	Board members would be fluent in talking about the organization and how funds would be used. They would be positive about their role. They would ask how they can help.

What would a typical person need to KNOW to be able to take this action?
What fundraising is, ways to contribute besides asking for money, information about the organization, information about potential donors and their giving history, a script for how to talk about giving

What TOOLS (sample documents, call lists, scripts, forms…) would a typical person need?
Budget, script, templated emails, list of donors

Workshop Design – Session 1

Topic: What is the purpose of your workshop?
Learning Objectives: By the end of this lesson, what will people be able to do?
Opening introduction. How will you interest them in the topic from the start?
Participant engagement. How will you get them talking or otherwise engaged within the first 10 minutes?

Look at your Learning Objectives. This section is to plan the lessons that lead to these objectives.		
Lesson 1	Activity that tests for understanding	Tool needed
Lesson 2	Activity that tests for understanding	Tool needed
Lesson 3	Activity that tests for understanding	Tool needed
Closure How will participants bring this back?		

Delivery strategies – Session 2

PEOPLE	**Social presence**: How will you increase social presence across these three categories?
	Teacher to student / *Student to student* / *Student to group*
	Priming: How can you prepare your people to learn? Think about days before the session and then minutes before the session.
TOOLS	**Engagement:** What engagement tools would be appropriate for your audience?
	Cognitive overload: What is the rule to avoid redundancy?
	PowerPoint: What tips could you apply to how you use PowerPoint?
EVALUATION	**Evaluation**: What is different about the LTEM model? (We will talk about 2 ideas.)
	Evaluation: How could you push your evaluation closer to the workflow?

Online Workshop/Meeting Checklist

Use this checklist to guide your process.

GET READY

- ☐ You have defined your focus audience.
- ☐ You have defined what they need to get out of this session.
- ☐ You have defined what actions you want them to be able to take after this session.

CONTENT

- ☐ You provide learning or meeting objectives that are appropriate for this audience. These objectives are something that you could see or hear (not "they will understand").
- ☐ You have a powerful opening that engages people right away.
- ☐ You have chunked out content or agenda items in a way that is meaningful to participants and that supports your objectives.
- ☐ You have edited down the content to just what they need to know/accomplish. This can be the hardest part!
- ☐ You have designed an activity for each chunk to give participants a chance to practice or engage, and to give you an opportunity for feedback.
- ☐ You have allowed for enough time for closure. During this time, participants will connect what they learned or experienced with ways to apply it within their own context and take next steps.

DELIVERY

- ☐ You conduct yourself as if you were delivering the session in-person. That may mean creating a standing desk so you can stand and deliver with your whole body.
- ☐ You build social connections with participants before and during the event. This might include calling people by name, referencing a challenge someone noted in the chat box, or reading body language.

- ☐ You set the tone for your event (priming). You invite people to work towards their best selves.
- ☐ You use PowerPoint to support what is said, not capture all that is said. You do not read slides.
- ☐ You plan for the two roles ("hats" if same person) in teaching: facilitator where you draw out their knowledge and subject matter expert where you share your knowledge.

TECHNOLOGY

- ☐ You know how to use the technology and its engagement tools.
- ☐ You use the engagement tools available to you (chat, Q&A, polling, whiteboard…).
- ☐ You consider engagement tools outside of your technology platform to encourage collaboration and shared notetaking (Google docs, Padlet, Mural, Sli.do, Mentimeter…)
- ☐ You do a trial run to ensure the technology will work.
- ☐ You have aligned expectations with a producer ready to support the technology and be your "eyes and ears" through the presentation.
- ☐ You provide any orientation to these tools needed for your participants. This may mean introductory slides if the conference producer doesn't provide these.

SUPPORTS

- ☐ You have provided any tools people might need to support reflection and learning transfer. This might include:
  - o Course webpage
  - o Slideshow in handout form
  - o "Placemat" reflection tool or worksheet
  - o Workbook
  - o Templates or sample documents
  - o Directory of resources

Workshop Scoring Guide

Use this scoring guide to evaluate a workshop or webinar. The goal is to move rightward in practice.

	DEVELOPING	SOLID	STRONG
GET READY			
Audience	Workshop is "one size fits all." There is no clear focus audience.	Workshop has a clear focus audience. You can tell this by how well the learning objectives reflect their reality and needs.	The workshop description states the intended audience. "This session is designed for X. It is not designed for Y."
Learning objectives	There are learning objectives.	You could see or hear the learning objectives (not "you will understand.").	The learning objectives connect with a larger purpose or goal.
Equity	Equity has not received any focused attention.	The presenter is intentional in how they create an affirming and inclusive environment for all participants.	The presenter highlights diverse perspectives, voices, and experiences.
CONTENT			
Opening	There is an intentional opening beyond introductions and speaker credentials.	The opening is designed to engage people right away. The opening includes any technology instruction needed.	The opening includes active engagement of participants within 10 minutes of starting.
Chunks	There are clear categories of information in the presentation.	The content is chunked into categories in a way that is meaningful to participants and that is clearly communicated.	The content chunks are supported by graphics or a visual roadmap that show how the parts come together to form the whole.
Curation	Some information has been left out due to time.	There is intentional curation of the content down to just what is needed to achieve the learning objectives.	Speaker is prepared to reference resources available outside of the presentation to fill gaps.
Activities	There are some basic activities to engage people.	The activities have been designed to support the learning objectives. They use technology appropriately for the audience.	The activities are also used to give the presenter feedback on how well participants are learning.
Closure	There is time for closure at the end of the session.	The closure gives participants an opportunity to plan for how they will bring what they learned back into where they will use that knowledge.	The closure invites participants to think about and plan for the prompts ("triggers") which will provoke a need for what they learned.
DELIVERY			
Set-up & posture	No special considerations have been made for how the presenter will deliver the session.	The presenter will deliver session in an optimal space to be seen and heard (microphone, lighting, etc.)	The presenter is set up to deliver the session in a whole-body way, which may mean standing.
Social connection	No special considerations have been made for how the presenter will build social connection.	The presenter will build social connection with participants before, during, and after the session.	The presenter has made social connection a key part of the session, integrating it into small group breakouts, asynchronous opportunities, or other elements of the session.
PowerPoint (if used)	PowerPoint supports learning.	PowerPoint is used as a tool that *supports* learning, not as a catch-all for all that will be said. Bullet point slides are used minimally if at all. Font size is at least 24 point.	PowerPoint is graphically engaging, drawing people in because of its use of color, shapes, graphics, differentiated slides, or other design choices.
SUPPORTS			
Communications/ tools	The presenter is not involved in pre- and post-session communication.	The presenter has prepared tools to support reflection and learning transfer. These will be shared with participants in advance of the session.	The presenter (or host organization) has created a landing page for easy access to the tools and documents needed for the session.

Learning Objectives

TASK	Calculate	Decide	Explain
CONCEPT	Classify or identify (example)	Distinguish (examples of concepts)	Explain
FACT	Recall	Recognize	
PROCESS	Troubleshoot	Predict	Improve
PRINCIPLE	Apply to a problem/decision	Predict	Explain

Credit: Brenda Segrue

ACTIVITIES TO REINFORCE LEARNING OBJECTIVES

Body voting	Discussion	Jigsaw	Role play
Case study	Exercises to practice	Mindmap	Simulation
Critical incidents	Fishbowl	Pair-squared	Structured note taking
Demonstrations	Games	Peer round tables	Quiz

The Learning-Transfer Evaluation Model

Abbreviated as LTEM (Pronounced "L-tem")

1	**Attendance**	**Learner signs up, starts, attends, or completes a learning experience.** *A metric inadequate to validate learning success—because learners may attend but not learn.*
2	**Activity**	**Learner engages in activities related to learning.** • Measures of Attention *A metric inadequate to validate learning success—because learners may pay attention but not learn.* • Measures of Interest *A metric inadequate to validate learning success—because learners may show interest but not learn.* • Measures of Participation *A metric inadequate to validate learning success—because learners may participate but not learn.*
3	**Learner Perceptions**	**Learner is queried in a way that does NOT reveal insights on learning effectiveness.** • Examples: Measures that target Learner Satisfaction, Course Reputation, etc. *A metric inadequate to validate learning success—because such perceptions are not always related to learning results.* **Learner is queried in a way that reveals insights related to learning effectiveness.** • Examples: Measures that target Learner Comprehension, Realistic Practice, Learner Motivation to Apply, After-Learning Support, etc. *Such measures can hint at outcomes but should be augmented with objective outcome measures.*
4	**Knowledge**	**Learner answers questions about facts/terminology.** • Knowledge Recitation—during or right after learning event. *Usually inadequate because knowing terminology does not fully enable performance.* • Knowledge Retention—after several days or more. *Usually inadequate because remembering terminology does not fully enable performance.*
5	**Decision Making Competence**	**Learner makes decisions given relevant realistic scenarios.** • Decision Making Competence—during or right after learning event. *Not a fully adequate metric because learners may forget decision making competencies.* • Remembered Decision Making Competence—after several days or more. *ADEQUATE TO CERTIFY DECISION MAKING COMPETENCE.*
6	**Task Competence**	**Learner performs relevant realistic actions and decision making.** • Task Competence—during or right after learning event. *Not a fully adequate metric because learners may forget their task competencies.* • Remembered Task Competence—after several days or more. *ADEQUATE TO CERTIFY TASK COMPETENCE.* *NOTE: "Tasks" comprise both decision making and action taking. For example, a person learning to write poetry could decide to use metaphor, could act to use it, or could do both.*
7	**Transfer**	**When learner uses what was learned to perform work tasks successfully— as clearly demonstrated through objective measures.** • Assisted Transfer—when performance is substantially prompted/supported. *ADEQUATE TO CERTIFY ASSISTED TRANSFER.* • Full Transfer—when learner demonstrates full agency in applying the learning. *ADEQUATE TO CERTIFY FULL TRANSFER.*
8	**Effects of Transfer**	**Effects of Transfer: Including outcomes affecting (a) learners, (b) coworkers/ family/friends, (c) organization, (d) community, (e) society, and (f) the environs.** *Certification at this level requires certification of transfer plus a rigorous method of assessing transfer's causal impact—including positive and negative effects.*

The LTEM model was developed by Will Thalheimer, PhD.
https://www.worklearning.com/

Resources

BOOKS

The Adult Learner by Malcolm Knowles

Design for How People Learn by Julie Dirksen

Evidence Informed Learning Design by Mirjam Neelen and Paul Kirschner

Instructional Design That Soars by Guila Muir

Map It: The Hands-On Guide to Strategic Training Design by Cathy Moore

Performance-Focused Smile Sheets by Will Thalheimer

RESOURCES by Nancy Bacon

www.nancybacon.com/resources

Conferences That Make A Difference

How to Design for Action

Racial Equity in Learning Checklist

Subscribe to Nancy's newsletter to receive monthly information on nonprofits and learning.

The future isn't something hidden in a corner. The future is something we build in the present.

- Paulo Freire

Our communities depend on strong nonprofits. Nonprofit people therefore need to know a lot. They need to be able to learn in ways that leave them ready to do things differently. At Nancy Bacon Consulting, we believe that every nonprofit learning experience should be excellent and action-focused. We work at the intersection of nonprofits, learning, and leadership to ensure nonprofits have what they need to succeed.

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