

How to deliver an effective workshop

There are 5 main elements to an excellent workshop. The overview below explains the elements. Use the Workshop Planner and Workshop Scoring Guide to support your design and delivery of an effective workshop.

Clear purpose

Start by stating the purpose of your workshop. You may assume everyone knows. Don't assume. This is how you make it clear from the start that you are here to use their time wisely.

Lesson chunks

These come directly from your learning objectives. To find your chunks, answer this question: what 3 things related to this topic do people need to know or be able to do? The right number of chunks might 2 or 4 for you, but don't go beyond 4. You won't have time.

Another tip is to share *how* to do something, not just *what* to do. Remember: the goal is that they learn the steps to do something on their own later. That means they need to know how.

Closure for learning transfer

This is the most important part of your presentation, so leave enough time. This is where you help them form the bridge between what you taught them and how they will apply it later. You help them to transfer knowledge into action.

Topic: What is the purpose of your training?		
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	Tool
Lesson 2	Activity	Tool
Lesson 3	Activity	Tool
Closure How will participants bring this back?		

Powerful opening

You have about 10 minutes at the beginning to hook people. Think about how you will get them immediately interested and engaged in what you have to say. Don't waste time with long introductions.

Activities that engage and show understanding

There are many ways to engage:

- Pair-share/Small group discussion
- Quizzes/polls
- Games
- Role plays
- Scenarios/case studies
- Question/answer

Tools that support action

You may give them a workbook or a guide that covers the whole workshop. You may have tools for each lesson or activity. Tip: what would you need to do what you are telling them to do? Make sure you give them that. A good tool supports your presentation so you don't have to rely on the words on slides to give them the information they need.



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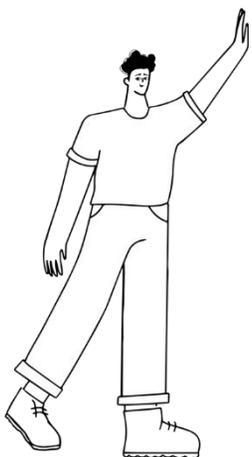
Workshop planner

Use this planner to design a workshop that will be effective and engaging.

Topic: What is the PURPOSE of your training?		Virtual opening checklist: <input type="checkbox"/> Ask participants to turn their cameras on if they are comfortable doing so. <input type="checkbox"/> Ask participants to put their name, preferred pronouns, and organization in their Zoom display name. <input type="checkbox"/> Review Zoom instructions. <input type="checkbox"/> Explain how questions will be seen and answered.
Learning objectives: By the end of this lesson, what will people be able to do? (This list will guide your design.)		
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	Tool needed
Lesson 2	Activity	Tool needed
Lesson 3	Activity	Tool needed
Closure: How will participants bring this back?		

Workshop scoring guide

	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 are clear and connect with a larger purpose or goal.
Time management	You have not considered breaks.	You have provided a time for people to take a break. 5 minutes per hour at least.	You have created a time management system that keeps you on track and honors learner needs.
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 brings in 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	The content is in broad categories, but that isn’t used to navigate through material.	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.	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 triggers that 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. This includes a professional microphone, adequate lighting, and the camera at eye-level (if online).	The presenter feels confident about how to use the room to maximize engagement.
Social connection	No 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 discussions, or other elements of the session.
PowerPoint (or other such tool)	The PowerPoint balances graphics and words.	PowerPoint is used as a tool that <i>supports</i> 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 larger strategy for maintaining communication with learners.



Activity Ideas

We include activities in our learning experiences to invite participants to apply what we teach them, to find exceptions or “snags,” and to access the peer group. Through activities, we receive feedback that informs us to add information or correct for wrong knowledge or practice. We create powerful learning experiences when we are intentional about how we use activities to support our learning objectives.

Here are some common activities ideas:

Body voting: Participants engage in a physical way, like thumbs up/down, hand-raising, standing up, or making a face

Case study: A scenario which requires participants to apply knowledge or skills

Critical incidents: A short scenario

Demonstrations: A step-by-step display of a skill or process

Discussion: Full or small group conversation about information presented

Exercises: Opportunities to apply a skill or practice a concept

Fishbowl: Small group of people engage in a discussion while a second group of people observe, listen, and provide feedback

Games: A structured form of play with an educational purpose

Jigsaw: Small groups of people engage in an activity or learn a topic. They become “expert” in that topic. The groups are then reassigned to a second group of people, in which they share their

expertise about the first topic. Individuals etch learning deeper into their memory by having to explain it and being asked about it.

Mind map: A diagram representing ideas, concepts, or items and how they are linked

Pair-squared: Two people (a pair) talk about a topic. Two pairs (four people) are then combined to share elements of their first discussion, adding new ideas together

Peer round tables: Small groups of people do an activity or have a discussion

Role play: Participants act out a scenario relevant to the lesson. They take on different personas to practice an idea

Simulation: An imitation of a situation or process

Structured note taking: Graphic organizer designed to help participants understand and remember information

Quiz: a short test to gauge learning