



present

Professional Development Essentials

**August 16, 2009
1:30 – 2:45 p.m.**

Content Leaders:

Chris DeVany, President, Pinnacle Performance
Improvement Worldwide

Tony Ellis, CAE, director of education, National
Association of College Stores

Patricia Hayden, Director of Professional
Development, National Association of Independent
Schools

**2009 Annual Meeting & Expo
Toronto, Canada**

*All contents copyright 2009, ASAE & The Center for Association Leadership, except noted selections
which have been reprinted with permission of the copyright owner.*

New educational Program IDEA

Explanation of Process:
We start with an idea for a new program or even a new idea for a new format/delivery of an existing program. We then put it through the Best Practice of Research to see if it holds water. We then have to be flexible to either start the program, shift the idea of the program after research was done or stop the program idea altogether, if feedback directs that way. Finally, we conduct segmented specific marketing for our various target audiences.

Best Practice #1: RESEARCH

1. Scanning the Environment - we look at what is occurring in the industry, economy, etc.
2. Survey our members/their staff - we conduct e-surveys to discover/confirm new ideas for educational programming
3. Select members of our target audience to confirm/reject program/format ideas

Best Practice #2: FLEXIBILITY

Start Program

Shift Program

Stop Program

Best Practice #3: SPECIFIC MARKETING

Create specific marketing for educational program slate.

Identify the need for the program rather than the want. Example, "you need to take this course for...reasons." As opposed to "This is a great course for ...reasons."

Identify every potential target audience and their various needs:

- In our industry:
- Young physicians
- Retiring physicians
- Physician office staff

PD Essentials ▲ A Checklist of Developing PD Programs

1. Program Design and Development – The ADDIE Model

a. *Analysis*

- i. Needs Assessment
- ii. Target audience
- iii. Gap analysis

b. *Design*

- i. Goals of program
- ii. Intended learning outcomes
- iii. Cognitive, Affective, Psychomotor
- iv. Program format and content delivery

c. *Development*

- i. Select methods and learning activities
- ii. Prepare all materials
- iii. Test and validate

d. *Implementation*

e. *Evaluate*

- i. Start at the beginning with the end in mind
- ii. Circle around at the end

Notes and Best Practices: _____

2. Understanding Adult Learning

➤ Name to know: Malcolm Knowles

- | | |
|---------------------------|---------------------------------------|
| a. Need to know | e. Orientation to learning |
| b. Learner's self-concept | f. Motivation |
| c. Role of experience | g. Physical and psychological comfort |
| d. Readiness to learn | h. Practical application |

Notes and Best Practices: _____

3. Learning Styles

- | | |
|---------------------------|---------------------------|
| a. Visual | d. Linguistic (Reading) |
| b. Auditory (Listening) | e. Logical |
| c. Kinesthetic (Hands-on) | f. Multiple Intelligences |

➤ **Name to know: Howard Gardner**

Notes and Best Practices: _____

4. Levels of Learning

Learning Objective Nouns

- i. Knowledge
- ii. Understanding
- iii. Application
- iv. Analysis
- v. Synthesis
- vi. Evaluation

Learning Outcome Active Verbs

Memorize, Recite, Name, Identify
Describe, Explain, Classify, Discuss
Apply, Choose, Employ, Operate, Practice
Compare, Contrast, Calculate, Test, Analyze
Construct, Compose, Create, Design, Propose
Argue, Assess, Defend, Judge, Evaluate

Notes and Best Practices: _____

5. Budgeting

- a. Fixed costs
- b. Variable costs
- c. Speakers and facilities

Notes and Best Practices: _____

6. Marketing and Promotion

- a. Print versus electronic
- b. New versus returning attendees
- c. Percentage of your budget
- d. 7 Contacts

Notes and Best Practices: _____

7. Implementation and Management

- a. Room space and set-up
- b. Comfort and safety
- c. A/V and specifics
- d. Oversight and emergencies

Notes and Best Practices: _____

8. Evaluate and Review

- a. Begin with the end in mind
- b. Nine areas to evaluate:
 - i. Content
 - ii. Instructional methods
 - iii. Handout/supplemental materials
 - iv. Instructor/speaker abilities
 - v. Facility and logistics
 - vi. Design and structure of program
 - vii. Knowledge gained / Achievement of Intended Learning Outcomes
 - viii. Attitude/behavior changes of the participant
 - ix. Effect on participant's organization
- c. Levels of Evaluation
 - i. Level 1: Participant reactions (smile sheets)
 - ii. Level 2: Knowledge gained (success in achieving learning outcomes)
 - iii. Level 3: Behavioral change (months after, reported by peer or supervisor)
 - iv. Level 4: Organizational impact (months after, reported by supervisor)

Notes and Best Practices: _____

Professional Development In Associations – Best Practices:

1. Provide the absolute best quality programs you can for your members.

What constitutes “best quality”?

- Effective presenters who you have seen present
- Effective presenters who someone whose judgment you trust has seen present
- Effective presenters that two or more colleagues have seen and recommend
- Topics that are of keen interest to your members (results from Member Survey)
- A presentation which gives people take-aways they can put into practice immediately
- A presentation which includes attendees’ completing their own Participant’s Action Plan

Your and others’ suggestions:

2. Bring in the best quality speakers you can

- Ask your colleagues and ask members who they want brought in as speakers
- See above...

Your and others’ suggestions:

3. Survey your members, so they can tell you what they want in the way of programs, topics and speakers

Your and others’ suggestions:

4. Use as many media as you can (print, e-mail, Web-based, “live” meetings)

Your and others’ suggestions:

5. If you have Chapters, ask them / require them (if you can) to follow the same “Best Practices” you are following in Professional Development.

Your and others’ suggestions:

6. Ask your Chapter leaders who the best speakers, topics and programs are

Your and others’ suggestions:

- 7. Ask your members and Chapter leaders what some of the best forums are for programs, above and beyond your Annual Meeting and any other “National” or “International” Meetings you host – Do people prefer Webinars, live “chats”, etc.? Are there certain technologies and providers (WebEx, GoToMeeting, etc.) which work well for them?**

Your and others' suggestions:

- 8. How do your members communicate with each other, with their Chapters and with you? Ask this question continually of your members, Chapter leaders and Program Directors / Program Committee Chairs as often as you can, so you are responsive to their needs.**

Your and others' suggestions:

- 9. Encourage people on your committees and in your Chapter Committees to “pair up” (co-chairs). This encourages volunteers to participate in providing quality programs and prevents them from feeling “overwhelmed”. Try pairing an experienced member with a less-experienced (and/or relatively new) member.**

Your and others' suggestions:

- 10. Facilitate at least a monthly meeting (live or on the phone) of your “Professional Development Committee” (paid staff and volunteers). Support (and or require if you can) in your Chapters.**

Your and others' suggestions:

- 11. If you have staff, meet with them every week, to support your success. The teams that succeed best are those who meet (even if by phone and/or a combination of in-person and conference call) every week. This also supports teams having a coherent and cohesive “game plan” – making sure everyone is on the “same page”.**

Your and others' suggestions:

12. Model best practices in your association when it comes to publications. Produce the best quality publications you can, supporting your members' professional development.

Your and others' suggestions:

13. In your publications, include your members as best you can. Solicit articles and other member contributions as best you can (not financial; we're talking about "Best Practices" and "Top 10 List" types of contributions in addition to articles).

Your and others' suggestions:

14. Try to involve and include any and all social media which support your association's success. You want to try to initiate, control and monitor these as best you can, as well as publish guidelines about their use as it pertains to your association.

Your and others' suggestions:

15. When I worked for another association in charge of educational programming, I would start off our webinar series with a free program of interest to both members and nonmembers on a topic that was important to everyone. I was then able to capture the information for future promotion purposes as well as cross-sell membership

Your and others' suggestions:

16. At my current association, we are offering a free webinar series to our members over the summer. The series is conducted by another member so there is no cost to us. The topic is timely and relevant for a large segment of our members and helps to stress the value of membership.

Your and others' suggestions:

17. We are using LinkedIn and Facebook to promote our various programs in a "soft sell" manner to reach out to individuals who may not be members.

Your and others' suggestions:

18. Collaborative Learning. Many people now have a strong preference for collaborative learning and this will continue to grow into the future. This preference is not just limited to online learning using group collaboration technologies. I also see more professions adopting problem-based learning, action learning, and other methods for co-creating the learning experience. If we pause to be historically honest, we have always created new knowledge this way, building on what others have learned, but we let the design of our learning experiences around the sage on the stage confuse us about how learning really happens. Learning has always been collaborative. We just have better tools now to make this a significant part of our learning culture.

Your and others' suggestions:

19. Repurposing and Extending Knowledge. Chris Anderson explained this idea well from a marketplace perspective in his book *The Long Tail*. I look at the same potential from a learning perspective. Why waste anything when we have so many channels for delivering what we have learned and so many people have different learning style preferences anyway? An increasingly popular example of repurposing in associations is offering non-conference participants web access to all recorded sessions and supporting resources at an affordable price. I just heard an even better idea this week in an interview with an association member. She wanted 15 minute knowledge segments accessible on the web that she could use in the limited time she has for periodic staff training. Web 2.0 gives us many creative options for repurposing and extending knowledge.

Your and others' suggestions:

20. Anticipatory Learning. I explore this process in-depth in my book, *Anticipate the Future You Want: Learning for Alternative Futures*. Anticipatory learning is a framework for acquiring the knowledge and skills to understand future possibilities and the ability to collaborate in creating a preferred future. When learning faces forward in this way, knowledge becomes a force field flowing into new possibilities. I feel strongly that associations and nonprofits have a particular responsibility to prepare their members and stakeholders for the future. They are responsible for helping their constituents learn and evolve to thrive in changing conditions. At a minimum, this means monitoring trends and issues and their implications to continually renew and keep relevant the knowledge in any field.

Your and others' suggestions:

21. We incorporated a journaling exercise into one of our seminars and, while sounding a bit hokey, the participants have raved about the benefits of tacking time to reflect on their learning experiences and to make personal plans and commitments.

Your and others' suggestions:

22. We partnered with Icohere several years ago to start developing online courses for our industry. We are now up to 7 courses and growing. It's been challenging at times, but far easier (over all) than we ever imagined!

Your and others' suggestions:

23. It may sound like an infomercial, but I keep the ASAE publication Core Competencies in Association Professional Development near my desk at all times. It's got everything you need to know from the educational side of association programming!

Your and others' suggestions:

24. We hold a leadership program for the leaders of the state and regional associations in our industry (they are not formally a part of our organization). We do a primer for them on adult learning, developing educational programs, and conference planning. It's one of the highest rated segments of the conference every year!

Your and others' suggestions:

25. If you are getting lots of other responses, great, but for me it would be easier to respond to specific questions, like:

- a. What is the most important thing your PD group accomplished in the past 12 months [webinars]
- b. What keeps you up at night? [faculty quality]
- c. What is your #1 goal for the next 12 months [update 3,000 pages of course materials so we can justify raising prices]
- d. What is the biggest mistake you made last year? [not cutting back soon enough as the economy slowed]
- e. If you got a \$100k grant, what would you spend it on? [a consultant to analyze our entire operation, then get us setup with an LMS and eLearning courses, and faculty training]
- f. What is a helpful web site you found in the past year? [ning.com]

Your and others' suggestions:

TECHNOLOGY

In discussion, we realized that we could have not just an entire ASAE Learning Lab devoted to technology as used in Professional Development, but for that matter, we could devote an entire day at the very least. We encourage discussion and note-taking not just during our Learning Lab, but also during the entire ASAE 2009 Toronto Conference.

Best Practices:

Your and others' suggestions:

MAKING LEARNING STICK

(What Managers Can Do to Ensure Learning Transfer Into the Workplace)

In order to ensure that professional development learnings are transferred into the workplace, what managers do before, during and after learning is just as important as what happens in the classroom.

Before Learning

- Ensure that every participant knows why they are attending the learning session and what you would specifically hope they derive for themselves and their work. (One-on-one conversations generally have greater impact than a memo or group announcement.)
- Ask the participant for their own personal objectives for the learning, i.e., what they hope to derive for themselves. (Putting this down on paper helps.)
- Help the participant to arrange their work schedule so that being away for learning won't put undue burden or stress on them.

During Learning

- Minimize disruptions for the participant; allow them the time away with little or no work distractions

After Learning

- Review with each participant what they learned from the program. Ask them questions, or allow them an opportunity to share with you one-on-one and in a team meeting the concepts and learnings that they think most apply to them and their job.
- Discuss their Action Plan; ask them how they think they are progressing
- Give them time to practice new behaviors, and offer them encouragement and feedback
- Follow-up with them within the next 30 to 60 days to review their progress; if not, revisit their Action Plan and discuss how the two of you can team to support their success.

Adapted from, "Transfer of Training," a study of 85 American firms, published in a book by the same name.

TRANSFER OF LEARNING

Using the numbers 1 through 9, rank in order of importance (1 = most important, 9 = least important) that *you believe* has the greatest impact in determining whether employee training is used or applied.

	Before Learning	During Learning	After Learning
Manager's Actions	_____	_____	_____
Participant's Actions	_____	_____	_____
Instructor's Actions	_____	_____	_____

TRANSFER OF LEARNING

Ranking indicates who has the greatest impact, and when, in determining whether learning is used or applied.

	Before Learning	During Learning	After Learning
Manager	#1: Manager setting objectives or expectations with employee.	#8: Creating an environment that supports learning. (e.g., no distractions)	#3: Manager reviewing what has been learned and allowing time for practice.
Participant	#7: Participant setting learning goals and minimizing distractions.	#5: Participant exhibiting self-direction in their learning.	#6: Participant developing and implementing an action plan.
Instructor	#2: Teacher building a proactive partnership with management and employees.	#4: Maximizing learning interactivity to encourage participant learning.	#9: Teacher evaluation and debriefing event with management and employees.

Adapted from "Transfer of Training," a survey of 85 American firms, in assessing the successes of their training initiatives.

Participant's Action Plan -- Template

The following is a sample Participant's Action Plan, which are often distributed to participants to facilitate both learning and practice of workshop learning objectives.

"Essentials of Project Management" Professional Development Program – Your Association

Participant's Action Plan / Evaluation

Our learning objectives include:

- Understand the essentials of project management
- Plan for identifying project needs
- Practice scheduling and teaming
- Create the necessary plans which will allow you to more effectively manage projects to success
- Help you to more effectively manage others' expectations
- Keep projects on track
- Gain knowledge and skills you can apply to all project team situations
- Keep content, process and structure on track to produce positive outcomes

Based on the concepts we've discussed, the action steps I plan to take include my doing *more of*, *less of* and or *differently*:

1. Understand the essentials of project management

More of:

Less of:

Differently:

2. Plan for identifying project needs

More of:

Less of:

Differently:

3. Practice scheduling and teaming

More of:

Less of:

Differently:

4. Create the necessary plans which will allow you to more effectively manage projects to success

More of:

Less of:

Differently:

5. Help you to more effectively manage others' expectations

More of:

Less of:

Differently:

6. Keep projects on track

More of:

Less of:

Differently:

7. Gain knowledge and skills you can apply to all project team situations

More of:

Less of:

Differently:

8. Keep content, process and structure on track to produce positive outcomes

More of:

Less of:

Differently:

NOTES:

Name: _____

Manager's Name: _____

How would you like to receive your follow-up reminders? (Please check all that apply)

E-Mail: _____ Mail: _____ Phone: _____

Your contact information:

E-Mail Address: _____

Mailing Address: _____

Phone Number: _____

Thank you for participating. Please take a few minutes to give us some constructive feedback about our Program.

1. What I liked / What worked well:

A.

B.

2. What might have been done differently:

Any additional comments: (Please feel free to use the back if you need it)

**“Professional Development Essentials”
Professional Development Program – Your Association
ASAE 2009 Toronto**

Participant’s Action Plan / Evaluation

Our learning objectives include:

- Reference a Professional Development Strategy Checklist
- Utilize a Best Practices in Professional Development Workbook
- Implement a Participant’s Action Plan

Based on the concepts we’ve discussed, the action steps I plan to take include my doing *more of*, *less of* and or *differently*:

1. Reference a Professional Development Strategy Checklist

What will I do:

More of:

Less of:

Differently:

2. Utilize a Best Practices in Professional Development Workbook

What will I do:

More of:

Less of:

Differently:

3. Implement a Participant's Action Plan

What will I do:

More of:

Less of:

Differently: