# Professional Development 201: From Basic to Dynamic
# Full Course Content

## Introduction

### Welcome

Welcome to *Professional Development 201: From Basic to Dynamic*, the second course in the Professional Development series.

To navigate through this course, click through each section and watch the videos. We strongly recommend that you view the entire course in sequential order to get the most out of the content. You should plan on spending about 90 minutes total time to complete this course.

In the first course, *Professional Development 101: The Basics*, we introduced you to six Professional Development, or PD practices:

- Sustain
- Design
- Promote
- Deliver
- Follow Up, and
- Evaluate

The first course provided an overview of these practices and how they can help increase the skill-building capacity of your staff. This course takes a closer look at two practices, Design and Deliver, to demonstrate how to:

- Incorporate adult learning principles into the design of a professional development event,
- Develop webinars from pre- to post-production, and
- Facilitate dynamic and impactful webinars.

At the end of this course, you will be able to:

- Define adult learning theory,
- Define "webinar" and explain what sets it apart from other online delivery methods,
- Describe the context of webinar design and delivery,
- Identify strategies that can improve delivery of webinars, and
- Describe how to evaluate and archive your webinar.

### What Is Professional Development?

Before we explore adult learning theory, let's review "What is Professional Development?"

Professional development, commonly referred to as PD, is a systematic process that strengthens how professionals obtain and retain knowledge, skills, and attitudes. It consists of intentionally designed processes and activities developed to improve organizational approaches.

The *CDC Professional Development Practices* are based on research and previously identified best practices that provide optimal conditions for implementation to occur.

As you'll recall from PD101, there are six professional development practices:

- Sustain a professional development infrastructure,
- Design professional development offerings,
- Promote professional development services,
- Deliver professional development,
- Provide follow-up support, and
- Evaluate professional development processes.

Although not a completely regimented process, the PD Practices do follow a logical flow, from one practice to the next. They create the framework for providing professional development offerings.

Professional development offerings follow a systematic process from planning to evaluation. Offerings are:

- Events such as trainings and workshops
- Information and presentation sessions, and
- Technical assistance

This course will focus on events. A professional development event, such as a workshop or training, is a set of skill-building processes and activities designed to assist individuals in obtaining new knowledge and skills. The purpose is to reach specific goals and improve workplace performance. Events can be face-to-face training, distance learning, workshops, train-the-trainer sessions, or webinars.

All events have three things in common. They are:

1. Targeted to a specific audience,
2. Centered on the learner, and
3. Contain a call to action.

The fact sheet, *Understanding Professional Development*, provides an overview of professional development and types of professional development events.

For this training, we will explore webinars as the primary PD event.

## What is a Webinar?

What is a webinar?

A webinar is an online seminar that allows participants from anywhere in the world to come together in a virtual classroom to share information via the internet.

Webinars use virtual classroom software to host participants. These platforms provide for the use of other web tools such as presentation slides, text chat, and web cameras. We will learn more about how to use these tools effectively in your webinar later on in this course.

Webinars have a number of advantages over other types of learning events, and they can be easy to pull off with the proper "know how."

An untrained webinar facilitator can lose her audience in a number of ways:

- Doing too much lecturing, having too many slides, or having too much drab text on the screen instead of images with emotional appeal can leave participants bored and disinterested.
- Using the wrong type of chart, using the wrong font, using too many tools, or using other confusing visuals can leave participants bewildered and lost.
- Not starting on time, being disorganized, experiencing technical glitches, or having too many people talking at once can leave participants frustrated and angry.

[*Explosion sound*]

To help make sure your webinar doesn't succumb to any of these common pitfalls, we've developed *PD201: From Basic to Dynamic* to help you design and deliver great professional development webinars!

We are going to provide you with background information and best practices on adult learning, content development, facilitating techniques, and evaluation methods that can help you before, during, and after your webinar.

We have a lot of information that we want to share with you, so let's get started.

Welcome to *PD201: From Basic to Dynamic*.

## Adult Learning Theories

### Domains of Learning

Effective professional development events, such as webinars, should follow adult learning principles to engage learners.

Adult learning theory began almost 200 years ago. However, it wasn't until recently that the concepts were fully incorporated into mainstream adult education practices.

Adult learning theory asks the question, "What factors impact adult learning and why?" To answer that, let's explore the three domains of learning and how they relate to adult learning theory. These are:

- Cognitive learning
- Affective learning, and
- Psychomotor, or behavioral, learning

The **cognitive learning domain** involves intellect—the understanding of information and how that develops through application on a scale that increases from basic recall to complex evaluation and creation.

The **affective learning domain** involves our emotions toward learning and how that develops as we progress from a low order process, such as listening, to a higher order process, like resolving an issue.

The **psychomotor learning domain** involves our physicality and how that develops from basic motor skills to intricate performance.

How do the Domains of Learning impact professional development? Each domain represents a continuum of processes that begins with the most simple and ends with the most complex process.

When designing and developing professional development events, keep in mind that the audience will be comprised of adults. Most adults have mastered lower order processes in each of the domains, such as recall of information in the cognitive domain; listening and paying attention in the affective domain; and demonstrating mechanical skill, such as using a computer, in the psychomotor domain.

To successfully engage the audience, events must be designed to reach participants on their level, which means going beyond the basic process and challenging them on higher order processes such as troubleshooting, prioritization, and adaptation.

The three domains are often attributed to Benjamin Bloom, an educational psychologist who edited the text *Taxonomy of Educational Objectives: The Classification of Educational Goals*. This is often referred to as Bloom's Taxonomy.

Now that we understand the application of learning domains in our professional development design, let's review other adult learning theories that can be applied to help effective professional development events.

## Adult Learning Styles

One of the earlier theories of learning styles, or "modalities," was put forward by Walter Barbe and Michael Milone. Barbe and Milone advanced the idea that every individual has a dominant learning style, also referred to as the **VAK Model**.

The three learning styles they described are:

- Visual learning
- Auditory learning, and
- Kinesthetic learning

**Visual learners** tend to learn best by "seeing" information. While an instructor may be lecturing, the visual learner is actually digesting more information through displays such as diagrams, illustrations, videos, or simply text on a handout, slide deck, or whiteboard.

**Auditory learners** benefit more from hearing information. These learners respond well to lectures, like to debate or talk through problems in order to solve them, follow spoken directions well, and may tend to read things out loud in order to better understand written text.  Incorporate auditory experiences with group discussions and question-and-answer sessions.

**Kinesthetic learners**, sometimes referred to as tactile learners, prefer to learn through the process of doing. They want to be "hands on" and can learn and remember things better when leveraging their desire for movement during a lesson. Examples of kinesthetic activities include role playing and diagramming.

Most people use all of the three learning styles. However, it is common for an individual to have a dominant, or preferred learning style.

In the next section we will learn about a final theory, adult learning assumptions.

## Adult Learning Assumptions

The last adult learning theory we will discuss is derived from the work of Malcolm Knowles.

Knowles developed basic assumptions about how adult learners differ than child learners.  They are:

- Self-concept
- Experience
- Orientation to learning, and
- Readiness to learn

Adult learners require some tailoring to how the instruction is presented.

- **Self-concept**: As a person matures, self-concept changes from dependence toward independence.  Therefore, adult learners prefer some degree of control over what they learn and how.
- **Experience**: Life experiences become a resource for learning over time.  Therefore, adult learners value discussions and active participation that connect with their experiences.
- **Orientation to learning**: Adult learners' perspective of time changes from one of future application to immediate application of learning. Accordingly, orientation toward learning shifts from subject-centered to problem-centered.  Therefore, they seek education based on what is relevant to their lives—often in response to a stressor or to solve a problem.
- **Readiness to learn**: Adult learners become more focused on the developmental tasks of social roles. Therefore, adult learners seek the benefit derived from prescribed topics, practical application of knowledge to problem solving, topics supportive of functional roles, or simply independent interest in a topic.

You can optimize the design and development phase of your event by asking questions based on Knowles' *Adult Learning Assumptions*.

Here are some sample questions.

- For **self-concept**: Does your audience expect a proactive learning experience? What type? At what frequency?
- For **experience**: How can the audience experience be incorporated to add realism to the training?
- For **orientation to learning**: How does this topic meet an immediate need or help clarify or solve a problem?
- For **readiness to learn**: Why does, or why should, your audience care about this topic?

The answers to these questions can help you better understand how content and design can be used to resonate with your audience.

Remember, successfully designed events have:

- Respected participants,
- Safe and supportive learning environments,
- Relevant content to participants' needs,
- Varied learning activities to address the needs of a diverse audience, and
- Opportunities for participants to practice skills and apply new knowledge.

## Activity 1: Adult Learning Theories

You are a member of the Training Development Group (TDG) of an organization. Juan is the group manager. You, Amy, and Tyrese are training specialists in the group. The TDG is discussing adult learning concepts during the kickoff meeting to develop the organization's latest professional development webinar.

**Juan:** We have a diverse audience. We know that means we need to incorporate a variety of learning styles as we design and develop our next webinar.

**Tyrese:** Yes, we want participants to be able to learn using the styles that are best suited for them.

**Amy:** We should remember to focus on Malcolm Knowles' assumptions about how adults learn as we develop the webinar.

1. TDG staff members recognize there are a variety of learning styles. These are:

    a. Rote memorization and drills

    b. Coaching and counseling

    c. Visual, auditory, kinesthetic

2. You suggest incorporating the following activity to engage kinesthetic learners:

    a. Show relevant videos that demonstrate a concept

    b. Place participants into small groups to participate in a role-playing activity

    c. Hold a question and answer session

3. Auditory learners may benefit more from which of the following activities?

    a. Role-playing

    b. Participating in question and answer sessions

    c. Downloading the PowerPoint® slides

4. Adult learners prefer some degree of control over what they learn and how. This assumption is known as:

    a. Self-concept

    b. Readiness to learn

    c. Orientation to learning

5. According to the assumption of orientation to learning, adult learners seek education based on:

    a. Stressors and wanting to solve a problem

    b. Relevance to their lives

    c. All of the above

6. To ensure a successful webinar, TDG's design plan should include:

    a. Content that is relevant to participants' needs, varied learning activities, opportunities to practice skills

    b. Regulatory content, visual learning activities, knowledge assessments

    c. A respectful learning environment, content that is relevant to the needs of auditory learners, knowledge assessments

## Activity 1 Answer Key

1. TDG staff members recognize there are a variety of learning styles. These are:

a. Try again! Rote memorization and drills are not recognized adult learning styles and may decrease motivation to learn.

b. Try again! Coaching and counseling are interventions designed to identify improvements and develop self-awareness. These are not recognized adult learning styles.

c. **Correct! These are the recognized adult learning styles.**

2. You suggest incorporating the following activity to engage kinesthetic learners:

a. Try again! This activity would engage the visual learner.

b. **Correct! This activity engages the kinesthetic learner by doing a task.**

c. Try again! This activity would engage the auditory learner.

3. Auditory learners may benefit more from which of the following activities:

a. Try again! This activity engages the kinesthetic learner by doing a task.

b. **Correct! This activity engages the auditory learner by hearing the questions and answers.**

c. Try again! This activity engages the visual learner.

4. Adult learners prefer some degree of control over what they learn and how. This assumption is

a. **Correct! Adult learners prefer some degree of control over what they learn and how.**

b. Try again! Readiness to learn refers to adult learners seeking the benefit or practical application of a specific topic, or having independent interest in a topic.

c. Try again! Orientation to learning refers to adult learners seeking education based on what is relevant to them.

5. According to the assumption of orientation to learning, adult learners seek education based on:

a. Try again! It is true that adult learners seek education in response to stressors or wanting to solve a problem, but other reasons also apply.

b. Try again! It is true that adult learners seek education based on relevance to their lives, but other reasons also apply.

c. **Correct! Adult learners seek education in response to stressors, wanting to solve a problem, or based on relevance to their lives.**

6. To ensure a successful webinar, TDG's design plan should include:

a. **Correct! A well-designed plan should include these variables.**

b. Try again! Not all content is regulatory in nature; visual learning activities only focus on visual learning styles; assessments are not the only measure of checking for understanding.

c. Try again! While a respectful learning environment is ideal, a well-designed plan should include the needs of visual and kinesthetic as well as auditory learners; assessments are not the only measure of checking for understanding.

## Before the Webinar - Preparations

### Webinar Differences

In this section, the focus is on webinars as the primary event for a professional development design and delivery. Webinars can be subcategorized as either synchronous or asynchronous. **Synchronous** learning means the instructor and learners are online at the same time. **Asynchronous** learning is when the instructor provides materials, lectures, and tests so they can be accessed by learners at any time.

Webinars are usually synchronous learning, but occasionally they are archived so that they can be viewed by participants at a later date. In fact, one of the things that sets webinars apart from other professional development events is the flexibility with which a webinar can be conducted.

Webinars are typically shorter than workshops or in-person training. Here is a list of types of professional development events and their typical duration times.

- Trainings and workshops are typically 3+ hours, in order for effective knowledge and skill transfer to occur
- Presentations may last 30 minutes up to 3 hours, and
- Information sessions can be anywhere from 30 minutes to one hour.

Webinars usually fall into the categories of "Presentations" or "Information Sessions;" therefore, the ideal duration is 90 minutes or less.

Webinars differ from traditional professional development events in a number of ways. Webinars:

- Can reach a large audience; many webinar platforms allow up to 1,000 participants.
- Can be recorded and archived for future use.
- Are inexpensive compared to in-person trainings or workshops—no travel, hotel, or per diem costs are necessary.
- Are easier to set up than traditional seminars. The rooms are virtual, and the presentations and handout materials are digital, which reduces cost by eliminating the need for expensive printing and reproduction services. It also reduces the labor burden on staff and minimizes the carbon footprint of an event.

The next section will go further into the Design phase of an event and take a look at best practices for online content creation and delivery during a webinar.

### Plans for Engagement

A consumer insights study shows that the average human attention span is eight seconds long – shorter than the average attention span of a goldfish! You can read more about this study, *Attention Spans*, in the Resources section. This doesn't mean that webinars should be under ten seconds in length; however, it does mean that a webinar, more so than a traditional seminar or workshop, will be competing for the audience's attention simply because it is online.

Webinars compete for space alongside participants' web browser, social media accounts, and email inboxes. To combat this, maintain a conversational tone. Engage with your participants frequently by interacting and getting them involved to keep their attention and avoid the passive transfer of information.

The book, *Webinars with WoW Factor*, by Becky Pike Pluth, is a great resource for interactivities that could help during the design stage of a webinar. Pluth categorizes interactivities with webinar participants using the acronym CLOSER. CLOSER stands for:

- Closers
- Learning activities
- Openers
- Soft openers
- Energizers, and
- Revisiters

**Closers** are one of the most important types of interactivities. The last few minutes of a webinar are critical in terms of getting participants to revisit course material, focus on what they've learned, and leave with a positive impression. Closers don't include evaluations. Those should take place before the closer. An example of a closer is to conduct a short question and answer session, allowing the learner to refocus, apply knowledge, and review.

**Learning activities** are opportunities to take your content and make it more interactive. Developing a learning activity may be more challenging than a closer or an opener because it will require adapting information into a puzzle or game. A "fill-in-the-blank" flow chart or logic model activity provides an opportunity to explain why that step belongs there and fits into the overall process.

**Openers** are important to lay the foundation for audience participation throughout the rest of the webinar. Lengthwise, these should be structured to correspond to the total course. That is, the longer the course content, the longer the opener should be. Openers set the tone for the webinar, get people sharing with one another, and build confidence. An example of an opener is an "Around the World" activity. If there are participants from all over the country, ask that they introduce themselves, name their location, and share one fact or idea about the topic of the webinar.

**Soft openers** are very similar to openers. These are icebreakers that usually occur five to ten minutes prior to the official start of the webinar as participants are entering the room. This could be something as simple as welcoming participants into the room through the text chat function.

**Energizers** are brief activities to help refocus tired participants and combat fatigue. These do not have to be related to the course content, but is important to build these into your webinar during the planning stage, especially for longer sessions. An energizer can be as simple as asking participants to stand up and stretch.

**Revisiters** are similar to a review. The biggest difference is that in a review, the facilitator is going back over the content. In a revisiter, the participants are going back over the content. For example, call on several of the participants to list their top takeaways at the end of each section or webinar as a whole.

Planning engagement activities will not only keep your participants involved, but will also help reinforce learning and concepts as you go along.

## Technology

While the technology used to deliver a webinar is not as important as the content itself, ineffective technology can distract participants from learning,

Webinars can be telephone only, using a simple conference call bridge line, or they can utilize Voice Over Internet Protocol (VOIP) and allow participants to listen using computer headsets. Synchronous webinars can also incorporate webcams to allow learners to see one another.

Many platform options are available. Regardless of platform, make sure it has these tools to help with engagement:

- **Application sharing** is also called remote desktop sharing. This feature allows the participants to watch as you demonstrate a program or navigate to a website.
- **Breakout rooms** are a more advanced feature. They are great for breaking up large audiences into smaller working groups for interactivities.
- **Polling** is a basic feature that allows you to gather data or feedback from participants in real-time. Polls can be built into the agenda as activities or added later as needs arise.
- **Text chat** allows participants to communicate with you when they may not be able or want to speak over the audio line. Text chat can be used for asking questions, addressing technical issues, or capturing participants' ideas or thoughts throughout the webinar.
- **Two-way audio** allows participants to use VOIP to communicate during the webinar and precludes the need for an additional conference bridge line. Two-way audio can also simplify audio recording for archiving purposes.
- **Video streaming** allows you to not only share video with your audience, but also to incorporate webcams into the event. Video steaming can be one-way (only the facilitator is on camera) or two-way (each participant is also on a webcam). Video streaming is helpful for facilitators because it allows them to constantly gauge audience engagement levels. However, not all participants may have webcams, know how to work them, or feel comfortable being on camera.
- The **whiteboard** is perhaps the most key feature. This tool allows you to share your content, (e.g., slides or images), and it can serve as a literal whiteboard to let you or your participants write, draw, or otherwise share ideas.

Current webinar platforms will have most, if not all, of these features. After the event is designed, find the platform with the right features and price structure to fit the needs of the webinar.

Various options exist for online web conferencing software or platforms that can be used to host your webinar, such as:

- Adobe® Connect™
- GoToWebinar®
- WebEx®, and
- Skype® for Business

*Disclaimer: CDC does not endorse any particular company, product, or platform. These are listed as examples of webinar platforms only.*

Each platform has its own strengths and weaknesses, including the number of participants allowed, features (such as interactivity options, customization, and analytics), and costs. Most of these platforms have tiered pricing structures, and many offer a free version. Conduct research to determine which platform best suits the needs of the webinar.

**Registration**

So, how do you get participants "in the room"?

Great design for professional development events is not a guarantee of success. Participants are needed to attend and learn!

Ensuring good attendance requires a balance of gently reminding participants about an upcoming event without being intrusive or bothersome.

It also requires selecting an appropriate time for the event. This includes everything from time of year, to the day of the week, to the time of day. Usually Mondays and Fridays are inconvenient, and early mornings and late afternoons are also poor choices.

This aspect of design goes back to the promoting practice of professional development.

The first step for communication is setting up a process for registering participants for the event. The registration process should be in place before contacting participants.

Registration can be as simple as having an inbox set up to receive email replies indicating that a person wants to attend, or more advanced using platforms such as Eventbrite®, which allows users to create customized event pages. These tools are usually free for free events.

Most webinar platforms will automatically generate emails to use as invitations once the event is designed and set up in the "room." The same is true for registration. Most registration platforms will automatically generate follow-up emails with the details of the event conveniently coded into an "add to calendar" Microsoft® Outlook® or Apple® iCal® event that is attached, much like any other meeting request.

If not using one of these platforms, draft follow-up emails with pertinent information prior to sending out invitations to be prepared to respond quickly. Quick response to registration is important for improving attendance.

Once the registration system is established, it is time to contact the potential participants about the event. Maintaining listervs and other databases of contact information for participants is a critical part of the Sustain and Promote practices discussed in PD101.

Invitations to the event can be sent six months to six weeks before the event. Again, this is a balancing act. The earlier you send invitations, the more likely participants will forget about the event. Conversely, if invitations are sent closer to the event date, the more likely it is that participants will have conflicts at the time selected.

Send reminder emails about the event—best practices indicate that four reminder emails be sent.

1. Two weeks prior to the event,
2. One week prior to the event,
3. A day prior to the event, and
4. The day of the event.

Depending on the size and make-up of your audience, this may be overkill. Know your audience and judge how much encouragement is needed to ensure participation.

**Practice**

Failing to prepare is one way to derail a webinar or other professional development event. If hosting a webinar, unfamiliarity with the platform can easily lead to user error with the software. You should familiarize yourself with all tools that may be used during the event, including the webinar platform and its features and conference line. Being able to seamlessly operate the technology will help reduce anxiety during the event.

Another best practice during the preparation stage is to do a run-through of the event. Ask coworkers or friends to sit in as participants while practicing the slides and activities. This exercise is an easy way to pinpoint any glitches, such as awkward transitions between activities or tools, periods where there is too much time between activities, or other areas where the event can be improved. This exercise may require the planner or facilitator to experience the event through the eyes of the participant. Things can feel quite different on the "other side of the screen." What may seem logical to the designer may not seem logical to a participant.

A best practice for conducting webinars is to split the hosting of the event into two roles: **facilitator** and **producer**. The producer will act as the technical assistant. This can relieve a lot of the pressure on the facilitator. While the facilitator is hosting the event, engaging with the participants, and leading them through the content, the producer can work behind the scenes to load and manage content on the whiteboard, prepare activities to go live, or go offline to handle any technical issues participants may have. While this does require additional manpower, it allows the facilitator to focus on the most important aspect of the event: guiding and engaging the participants.

Finally, it is important to have a **backup plan**. When you are using technology, there is the potential for issues such as hardware crashes, software freezes, and power outages. A backup plan — even one as simple as taking a 15-minute break to reboot — will help you be more confident if something goes wrong.

Let's review webinar preparation activities before moving on to the next section of the course.

## Activity 2: Webinar Preparations

Now that Amy and Tyrese have finished working on the PowerPoint® slides, Juan calls a meeting for the group to brainstorm activities for participant engagement and discuss webinar logistics.

1. Amy wants to set a tone of interactivity for the webinar. She suggests an opener to lay the foundation. An opener will get the participants to begin sharing experiences and building confidence with the technology. Which activity would meet that goal?

    a. Around the World: Participants are asked to click on their location on a world map graphic to pin a flag and then introduce themselves using the text chat feature

    b. Stretch and Bend: Participants are asked to stand up and touch their toes to energize them and combat fatigue

    c. Fill in the Step: Participants are asked to start with a learning activity by filling in blank parts of a flow chart on a whiteboard

2. Before determining any activities, Juan asks the group to review the webinar platform to ensure the platform's selection of tools will support the engagement activities. Based on Amy's suggestion for an opener activity, you know these features will be needed:

a. Breakout rooms and two-way audio

b. Video streaming and polling

c. Whiteboard and text chat

3. You know the facilitator will be demonstrating a program on his computer and navigating a website during the webinar. The appropriate tool to use is:

a. Video streaming

b. Application sharing

c. Two-way audio

4. The team determined which platform to use for the webinar and initiated the communication plan. The first step for communication is:

a. Setting up a registration process

b. Sending an introductory e-mail message about the event

c. Making phone calls to participants of a previous event

5. Tyrese followed up with registered participants daily in the month preceding the webinar. What schedule would have been more appropriate for Tyrese to follow?

a. Send the first invitation one year in advance and then a follow-up e-mail six months later

b. Send reminders two weeks, one week, one day, and on the day of the webinar

c. Send one reminder e-mail message the day before the scheduled webinar

6. Tyrese and Amy established their roles for the webinar. Tyrese's role was to engage with the participants and lead them through the content. Amy's role was to load and manage content, prepare activities to go live, and handle technical issues. What were their roles?

a. Tyrese was the facilitator; Amy was the producer

b. Tyrese was the leader; Amy was the assistant

c. Tyrese was the Web master; Amy was the host

7. Tyrese and Amy felt ready to deliver the webinar. The webinar platform was chosen, invitations sent, registrations confirmed, roles assigned, activities planned, and content uploaded. You noticed other important details they had missed before the webinar date. What did Tyrese and Amy fail to do?

a. Conduct a run-through of the event to familiarize themselves with the webinar tools

b. Develop a backup plan in the event of technology issues, such as hardware or software freezes and power outages

c. All of the above

## Activity 2 Answer Key

1. Amy wants to set a tone of interactivity for the webinar. She suggests an opener to lay the foundation. An opener will get the participants to begin sharing experiences and building confidence with the technology. Which activity would meet that goal?

a. **Correct! This activity lays the foundation for audience participation and helps build confidence with the technology tools of the webinar platform.**

b. Try again! This activity is an energizer more appropriate to help refocus tired participants rather than set a tone of interactivity.

c. Try again! This is a learning activity more appropriate to challenge participants as they acquire information or knowledge rather than set a tone of interactivity.

2. Before determining any activities, Juan asks the group to review the webinar platform to ensure the platform's selection of tools will support the engagement activities. Based on Amy's suggestion for an opener activity, you know these features will be needed:

a. Try again! Breakout rooms would be more appropriate to divide a large audience into smaller working groups. Two-way audio would be more appropriate for verbal communication.

b. Try again! Video streaming would be more appropriate to share video or incorporate webcams. Polling would be more appropriate to gather data.

c. **Correct! A whiteboard allows any content to be shared, and the text chat feature allows for communication during an opener activity.**

3. You know the facilitator will be demonstrating a program on his computer and navigating a website during the webinar. The appropriate tool to use is:

a. Try again! Video streaming would be more appropriate to share video or incorporate webcams.

b. **Correct! Application sharing is the appropriate tool to demonstrate a program or navigate a website.**

c. Try again! Two-way audio would be more appropriate for verbal communication.

4. The team determined which platform to use for the webinar and initiated the communication plan. The first step for communication is:

a. **Correct! This is the first step. A registration process should be in place before you contact participants.**

b. Try again! A registration process should be in place before contacting participants.

c. Try again! Participants of a previous event may or may not be the appropriate audience for this event.

5. Tyrese followed up with registered participants daily in the month preceding the webinar. What schedule would have been more appropriate for Tyrese to follow?

a. Try again! The earlier you send invitations, the more likely it may be that participants will forget about your event.

b. **Correct! This schedule is a best practice to achieve an appropriate balance of communication.**

c. Try again! It is likely that participants may have conflicts for the time you have selected if fewer than four reminders are sent.

6. Tyrese and Amy established their roles for the webinar. Tyrese's role was to engage with the participants and lead them through the content. Amy's role was to load and manage content, prepare activities to go live, and handle technical issues. What were their roles?

   a. **Correct! These roles are identified as a best practice for conducting webinars.**

   b. Try again! These are not recognized roles for conducting webinars.

   c. Try again! These are not recognized roles for conducting webinars.

7. Tyrese and Amy felt ready to deliver the webinar. The webinar platform was chosen, invitations sent, registrations confirmed, roles assigned, activities planned, and content uploaded. You noticed other important details they had missed before the webinar date. What did Tyrese and Amy fail to do?

   a. Try again! While they should have familiarized themselves with all tools that may be used during the event, there are other actions that could have also been taken.

   b. Try again! While they should have developed a backup plan, there are other actions that could have also been taken.

   c. **Correct! Tyrese and Amy should have familiarized themselves with all tools that may be used during the event and developed a backup plan.**

## Before the Webinar – Visuals

### Developing the Presentation

Creating engaging visuals is an important part of the preparations for a webinar. PowerPoint® and Keynote® are popular tools to create visuals. As with an in-person presentation or training, there are some important rules to remember when designing slides.

Slides should guide your presentation. Sometimes the content on slides can creep into the "nice to know" area and then there are too many slides or too much content on each slide. Keep the content on a slide to essential information. Send digital handouts with all the "extra" information to participants prior to the webinar. Handouts provide a greater level of detail to help participants gain a better understanding of the topic.

Here are some best practices when developing your presentations slides.

- Don't use too much text. Too much text can be overwhelming to try to read.
- Use contrasting colors that are easy to read, keep text large with brief statements, and limit the amount of text per slide.
- Don't crowd the slide. It will be more difficult for the audience to read and know what to focus on.
- Add negative space. Again, this will help with the slides' readability.
- Don't make the slide difficult to read. Small changes can make a big difference.
- Make text easy to read. Pay attention to backgrounds and fonts.

As alluded to, the choice of **text fonts** can help with the readability of slides. Here are some tips on how to effectively use fonts in your visuals:

- Follow the 2 x 2 rule. Don't use more than two types of font per slide or more than two sizes of font per slide. The types of fonts used should be complementary, such as Arial and Arial Bold. Anything more can prove distracting.
- Use sans serif fonts for online presentations. A serif is a small line or slight projection at the end of a stroke in a letter. A serif only exists in certain typefaces such as Times New Roman or Courier New. Those fonts are referred to as serif fonts. Serif fonts were designed to make it easier to read printed documents like newspapers that are filled with text. Sans Serif fonts, such as Arial or Helvetica, are better for presentations because minimal text is shown on slides, and the font size will be much larger than the typical printed document.

Follow these best practices and your audience will be able to visually follow along with your webinar content.

### Images

The old axiom "a picture is worth a thousand words" is true for presentation slides as well. That said, sometimes it's great to combine the two. A simple finding, such as "*Students with better fitness are linked to higher achievement scores*" can have a bigger impact on your audience when it's paired with an appealing image. For instance: one with a smiling student in a physical education class.

Something else to consider is using video, audio, or animated clips. These can add interest to slides that would otherwise display only text, but is important to use them only when appropriate, such as to clearly illustrate or underscore your point. Using clips because they are funny or cute can be distracting.

One quick way to improve visual appeal is to utilize **visual lists**, instead of bullets.

The use of charts to display data in a graphic form is also useful, especially when the information contains many details. Selecting the correct type of chart for the data you are presenting is important.

Different charts include:

- Pie charts
- Vertical bar charts
- Horizontal bar charts, and
- Line charts

**Pie charts** are most often used to show percentages. Remember to use contrasting colors and keep the data labels visible.

**Vertical bar charts** show variation in quantity over time. Be sure to limit the number of bars and use contrasting colors.

**Horizontal bar charts** show comparison between quantities. These differ from vertical bar charts in that they compare quantities over a different variable than time, such as a region.

**Line charts** are used to demonstrate trends. Typically, line charts are used to show a trend moving upward to indicate a positive. However, it can also be useful to indicate a negative trend with an upward line chart. More than one line can be used to compare and contrast trends.

Images can tell a more detailed story than text, but make sure you are using purposeful visuals. Otherwise, they can distract the audience from what you are trying to get across.

**Legal Considerations**

There are legal considerations when using photos, illustrations, and videos. The use of copyrighted material in presentations is a confusing topic that often produces many questions without a lot of straightforward answers. The simplest answer to the question is this: if you have any doubt about whether the work you want to use is covered, contact the copyright holder first and ask permission. Or, don't use copyrighted work in your events.

Copyright issues are handled on an individual basis. In other words, not all instances of use are the same. Some instances may fall under the legal doctrine known as "fair use."

There are four factors taken into consideration when determining fair use of a copyrighted work.

- **Purpose of the use**: Just because a video clip is being used for educational purposes does not make it fair use. However, nonprofit educational use is distinguished from commercial use under the law.
- **Nature of the copyrighted work**: Nonfiction or factual works are more likely to fall under the protection of fair use than fictional or creative works.
- **Amount of the work being used**: Shorter, smaller reproductions are more acceptable under fair use. A five-second clip is likely to be more acceptable than a five-minute clip, and
- **Promote effect on the original work**: The number of times the work is used (and the number of people it is shown to in this new context) will have an impact on fair use. The broader the distribution of a webinar, the less likely it is to be protected.

For more information, visit the:

- OWL Purdue Online Writing Lab, and
- The Webinar Blog, *Web Conferencing Tips, News, and Opinions*.

Now that we have covered many aspects of designing the presentation for online delivery, let's review.

## Activity 3: Webinar Visuals

Amy and Tyrese have been working with a subject matter expert to develop content for the organization's next professional development webinar. You have been tasked with reviewing their materials.

1. The webinar content Amy and Tyrese developed was designed for asynchronous learning. This type of learning refers to when the:

    a. Instructor and learners are online at the same time

    b. Instructor provides training materials to be accessed by learners at any time

    c. Instructor reads a narrated script that learners hear at an appointed time

2. You noticed that many of the slides contain a lot of text. You suggested pairing the text with images for a greater impact, using visual lists instead of bulleted lists to:

    a. Improve the visual and emotional appeal of the slides

b. Add white space around text

c. Add variety to the slides

3. You recommended the use of charts to display data. Tyrese asked which type of chart he should use to show percentages. You responded, the chart that best represents percentages is a:

a. Line chart

b. Bar chart

c. Pie chart

4. Tyrese wanted to revise the slides with more charts for other types of data. He wants to show variations in quantity over time as well as comparisons between quantities. He should use:

a. Line charts and bar charts

b. Vertical and horizontal bar charts

c. Pie charts and line charts

5. Amy used these fonts in the slides: Times New Roman, Courier New, and Arial. Which visual design rule did she break?

a. The three-way rule that states not to use more than three fonts per slide

b. The 2 x 2 rule that states not to use more than two types nor more than two sizes of fonts per slide

c. The Serif-Sans Serif rule that states not to use difficult to read fonts on slides

6. Sans Serif fonts , such as Arial or Helvetica, are recommended for online presentations because:

a. Sans Serif fonts make words easier to read online

b. Small lines at the end of a stroke in a letter make words easier to read

c. These fonts are less distracting

## Activity 3 Answer Key

1. The webinar content Amy and Tyrese developed was designed for asynchronous learning. This type of learning refers to when the:

a. Try again! This type of learning refers to synchronous learning.

b. **Correct! This type of learning refers to asynchronous learning.**

c. Try again! This type of learning would be considered synchronous learning because all the learners are connected at the same time.

2. You noticed that many of the slides contain a lot of text. You suggested pairing the text with images for a greater impact, using visual lists instead of bulleted lists to:

a. **Correct! Visual lists improve the visual and emotional appeal of the slides because these lists can provide color and other variations from plain bulleted text.**

b.  Try again! Although white space around text can offer contrast, there is a more appropriate response to provide greater impact.

c.  Try again! Although variety does improve visual appeal, there is a more appropriate response to provide greater impact.

3.  You recommended the use of charts to display data. Tyrese asked which type of chart he should use to show percentages. You responded, the chart that best represents percentages is a:

a.  Try again! A line chart is used to demonstrate trends.

b.  Try again! A bar chart is used to show comparisons between quantities.

c.  **Correct! A pie chart is used to show percentages.**

4.  Tyrese wanted to revise the slides with more charts for other types of data. He wants to show variations in quantity over time as well as comparisons between quantities. He should use:

a.  Try again! While bar charts do show variations in quantity over time, line charts show trends rather than comparisons between quantities.

b.  **Correct! Vertical bar charts show variations in quantity over time, and horizontal bar charts show comparisons between quantities.**

c.  Try again! Pie charts show percentages, and line charts demonstrate trends.

5.  Amy used these fonts in the slides: Times New Roman, Courier New, and Arial. Which visual design rule did she break?

a.  Try again! A maximum of two types of fonts should be used per slide.

b.  **Correct! A maximum of two types of fonts and two sizes should be used per slide.**

c.  Try again! There is no such rule as the Serif-Sans Serif Rule.

6.  Sans Serif fonts , such as Arial or Helvetica, are recommended for online presentations because:

a.  **Correct! Text on screens is easier to read when Sans Serif fonts are used.**

b.  Try again! Small lines at the end of a stroke in a letter refer to Serif fonts, which are easier to read for print documents filled with text, such as newspapers.

c.  Try again! While these fonts may be less distracting to read text on screens, there is a more appropriate response.

## During the Webinar

### Audience Orientation

Once the webinar is live, take a moment to familiarize the audience with the platform. For some, it may be their first time participating in a webinar and their first interaction with the technology. This can lead to uncertainty and confusion for learners, which can in turn lead to reduced engagement, or even tuning out altogether. Explain how the tools you are going to be using will work.

If using a separate conference bridge line for audio, be sure the dial-in information is prominently displayed and call attention to them. This will help the participants rejoin the group promptly if they get cut off for any reason (a dropped signal or dead cell phone battery is common).

Remember, the soft opener and opener activities we discussed in the Webinar Preparations section are excellent opportunities to do icebreakers while simultaneously acclimating learners to the room. Run a quick poll asking, "Is it raining where you are?" or have them type a quick "Hello!" in the text chat. These activities only take a moment but will identify issues participants may have with the interface before the main presentation begins. Take the time to resolve the issues so delays won't occur later.

A few minutes of instruction at the beginning of an event can have a participant go from…this [*image of woman appearing frustrated while sitting in front of her computer*]… to this [*image of same woman appearing happy while sitting in front of her computer*].

## Facilitaiton Techniques and Responsibilities

In PD101, facilitation was differentiated from training in this way: Training involves moving from unknowns to knowns to meet objectives that were established beforehand. It focuses on a specific set of skills or knowledge that can be applied in the workplace. Facilitation is a process where participants start with information about a topic or problem and work toward an outcome. The outcome is not set when the facilitation process begins. A facilitator leads this process.  For webinars, the leader acts more as a facilitator than a trainer.

A facilitator is often referred to as "a guide on the side, not a sage on the stage." Like tour guides, facilitators have an audience consisting of members who have their own interests, who participate for knowledge and context. Audiences don't want to spend the day looking at the tour guide or focusing on irrelevant material.

Facilitation skills include the ability to:

- Create an atmosphere where meaningful learning can take place,
- Spark excitement and anticipation,
- Encourage active involvement, and
- Transfer the responsibility of learning into the hands of the participants.

Facilitators have a number of responsibilities that tie into effective learning. In particular, they should

- Be prepared and punctual in starting and executing activities,
- Set a climate of openness and learning,
- Encourage participation and provide opportunities to apply learning,
- Establish and maintain positive interactions, and
- Evaluate the climate of the group, making tweaks to the delivery of content style, as needed.

To optimize delivery, facilitators can reflect on these questions based on adult learning theory:

- **Self-concept** — Am I responsive to audience and time? Do I have options to deliver content with engagement as time and responsiveness allows? Do I manage interactive activities so participants can participate fully?
- **Experience** — Am I creating opportunities for audience feedback? Do I use effective facilitation techniques to draw out audience insights?

- **Orientation of Learning** — Do I kick off the training by highlighting how the content will assist with real-world problems? Is this based on audience pre-assessment data?
- **Readiness to Learn** — Am I engaging the audience to create teachable moments? Am I demonstrating the lesson is relevant?

Leveraging these concepts will better prepare you to engage audience members and increase participation.

Now, let's look at some other tips for audience engagement as a facilitator.

Being an effective facilitator is not just about understanding your role, it is also about playing it. Here are tips for how to give your best performance during the webinar.

- **Pay attention to the audio**. Audio is a vital element of a webinar. To make sure that everything goes smoothly, pick the right location for the setup. Find a quiet room to record. Consider using a landline instead of a wireless Internet connection to avoid any potential Wi-Fi "dropouts."
- **Use a superior microphone**. Use a headset instead of relying on the built-in microphone on your laptop or desktop computer. If the webinar includes multiple speakers in the same location, equip yourself with a high-quality speakerphone.
- **Speak clearly and fluently**. To make sure that voice-overs are effective, avoid fillers such as "uhm" or "err." Use vocal variety to captivate your audience.
- **Use short stories to introduce yourself**. Explaining what brought you to the topic will establish trust and develop an emotional connection between facilitator and audience.
- **Speak with authority, but maintain a welcoming, conversational tone**. Be enthusiastic. You are talking to people, not to the computer. Address the audience by using the pronoun "you" in sentences.
- **Use humor**. Don't be afraid to throw in a funny comment, but be sure it is politically and culturally correct and relevant.
- **Orient participants**. Always lay out the ground rules for participants. This includes courtesies such as muting phones when not speaking and speaking one at a time. This also includes instructions on how to use the webinar platform.
- **Dress professionally**. If using a webcam, make sure you dress professionally and have proper lighting and neutral office background. Also, look directly into the camera.

These are some of the "do's" of facilitation. Some of the "don'ts" will be reviewed in the next section.

## Common Pitfalls

We've talked a lot about some of the best practices for the design and delivery of a webinar. However, sometimes you can learn a lot by talking about what **not** to do.

To avoid common pitfalls, **facilitators** should remember to:

- **Start and end on time**. Log into the room early and reward punctuality by starting on time. Waiting for others only gives those who arrived on time the opportunity to become distracted.

- **Include a soft opener**. Use these to break distractions. A soft opener gets participants to think about the content and use the platform tools.
- **Have an agenda**. Give participants an agenda so they have an overview of topics to be covered and get a sense of how the webinar will progress.
- **Include participant interaction**. Plan interactivities throughout the event, not just in the beginning, middle, and end. Think about the pace of the event. Stick to the schedule to avoid rushing through certain sections.
- **Remind participants to speak one at a time**. Too many people talking at once can cause a lot of distraction and turn the webinar into a garbled session. Don't be afraid to interrupt side conversations or the group as a whole to remind participants to speak one at a time so that the entire group can hear.
- **Handle questions properly**. Spending an inordinate amount of time on a single person's question will lose the rest of the audience. Gauge the length of the anticipated response before answering. Table it for the end of the section if it appears it will run long. Use a "parking lot" to store questions and discussions that might distract from your main content.
- **Limit text on the screen**. Best practices for slides were covered in the Before the Webinar section, but it is worth repeating.
- **Limit the use of tools**. Some webinar platforms have amazing features. Several were mentioned in the Webinar Preparations section. Don't feel pressured to utilize all features in a single event. Participants can get confused and frustrated if they are bounced from tool to tool.
- **Be organized**. This can lead to erosion of confidence and loss of credibility. Keep the work space clean; have guidance tools at hand and organized.

**Producers** can also hit some snags during a webinar. Producers should always remember to:

- **Test the media in advance**. Log in well ahead of time to make sure everything in the platform is working properly. This activity allows time for troubleshooting in case something is amiss.
- **Know how to use the platform**. All platforms are somewhat similar, but they are all somewhat different as well. The producer may operate Adobe® Connect™ effectively but be less comfortable with Skype®. He or she may need a practice session so as not to fumble the launch of the webinar. Technical glitches put the technology—not the content—on center stage.
- **Remember to record**. This oversight happens frequently. The easiest way to avoid this mistake is to start recording before the participants arrive. Audio and video files can be edited to trim dead air—but only if they are recorded first!
- **Stay focused**. Ignoring text chat questions or requests for help make participants feel slighted. Eliminate distractions and pay close attention.

Now, let's review what we have covered in this section.

## Activity 4: The Webinar

It is webinar day for the Training Development Group. The focus of today's webinar is to facilitate a discussion about a specific topic among participants. Tyrese, the facilitator, is working to encourage

active involvement and provide opportunities to apply learning throughout the webinar. Amy, the producer, is working behind the scenes on webinar logistics.

1. There are distinctions between trainers and facilitators. As the webinar facilitator, Tyrese will not operate from specific outcomes. Instead, he will facilitate a discussion where participants start with information about a topic and work toward an outcome. To achieve the best results, Tyrese needs to:

    a. Direct learning, give information, and move from the unknown to the known

    b. Encourage participants to express their views, guide the interaction, and move from the unknown to the known

    c. Move from the known to the unknown, guide the interaction, and direct learning

2. Amy reviewed the webinar preparations checklist and felt ready to initiate the webinar session. She had scheduled a conference room in a quiet location to record the session. There was a wireless Internet connection and a built-in microphone on the computer in the room. The presentation slides were uploaded. Amy used the whiteboard to share an introductory slide with flashing text in yellow font, "Please stand by. The session will begin shortly." How could Amy have improved upon her preparations?

    a. There was nothing else Amy could have done to improve upon her preparations. She was well prepared and made appropriate decisions for the location, equipment, and platform features.

    b. Amy should have used a landline with a telephone headset. She should have avoided gratuitous animation and difficult-to-read font colors in the introductory slide. She missed an opportunity to use a soft opener activity to acquaint the participants with the technology.

    c. Amy should have selected a different location that would provide background noise for the recording. She should have used a superior microphone instead of the built-in unit on the computer. She should have displayed a preview of all the presentation slides.

3. Amy logged into the meeting room, and Tyrese began the webinar at the top of the hour as scheduled. He soon noticed that very few participants had logged on, so he made an announcement that he would wait five minutes before getting started with the topic discussion. How did this cause audience engagement to suffer?

    a. Those who had arrived on time were likely to become distracted by other tasks

    b. Punctuality was not rewarded

    c. All of the above

4. Eventually, more participants logged into the meeting room, and Tyrese facilitated a dialogue among the participants after Amy opened the phone lines. A lively discussion ensued, and the webinar dissolved into a garbled session with too many people talking at once. How could Tyrese have controlled the situation?

    a. He could have started the session with some guidance on audience participation to appear more organized and maintain credibility

    b. He could have interrupted the conversation to maintain control

c. He could have utilized one of the interactive tools of the webinar platform to get the participants involved in another activity

5. Several participants asked questions that were not related to the discussion topic throughout the webinar. Tyrese spent several minutes answering an off-topic question in detail. Amy saw he was beginning to lose the rest of the participants when she saw a downturn on the engagement meter on the producer screen. How could this have been avoided?

a. Tyrese could have ignored the off-topic questions and redirected the audience to the main content

b. Tyrese could have provided an abbreviated response and hope that would be enough to satisfy the participant

c. Tyrese could have used a "parking lot" to store questions and discussion that might distract from the main content

## Activity 4 Answer Key

1. There are distinctions between trainers and facilitators. As the webinar facilitator, Tyrese will not operate from specific outcomes. Instead, he will facilitate a discussion where participants start with information about a topic and work toward an outcome. To achieve the best results, Tyrese needs to:

a. Try again! As a facilitator, Tyrese will be guiding interaction rather than directing learning.

b. **Correct! As a facilitator, these are the actions Tyrese needs to take.**

c. Try again! As a facilitator, Tyrese will be guiding participants to move from the unknown to the known.

2. Amy reviewed the webinar preparations checklist and felt ready to initiate the webinar session. She had scheduled a conference room in a quiet location to record the session. There was a wireless Internet connection and a built-in microphone on the computer in the room. The presentation slides were uploaded. Amy used the whiteboard to share an introductory slide with flashing text in yellow font, "Please stand by. The session will begin shortly." How could Amy have improved upon her preparations?

a. Try again! While Amy made good decisions about the location and platform feature she chose, there were other steps she could have taken to improve upon her preparations.

b. **Correct! These are all steps Amy could have taken to improve upon her preparations.**

c. Try again! The webinar recording could have been compromised had Amy chosen a location with background noise. Additionally, there would be no advantage to displaying a preview of all the presentation slides.

3. Amy logged into the meeting room, and Tyrese began the webinar at the top of the hour as scheduled. He soon noticed that very few participants had logged on, so he made an announcement that he would wait five minutes before getting started with the topic discussion. How did this cause audience engagement to suffer?

a. Try again! While it is true that waiting for others made it likely that those who arrived on time would become distracted, there were other consequences as well.

b. Try again! While it is true that punctuality was not rewarded, there were other consequences as well.

c. **Correct! Tyrese's decision to wait five minutes caused audience engagement to suffer from distractions. Not rewarding their punctuality could be demotivating.**

4. Eventually, more participants logged into the meeting room, and Tyrese facilitated a dialogue among the participants after Amy opened the phone lines. A lively discussion ensued, and the webinar dissolved into a garbled session with too many people talking at once. How could Tyrese have controlled the situation?

a. **Correct! Tyrese could have better controlled the situation by starting the session with some guidance on audience participation.**

b. Try again! Interrupting the conversation might have been effective had it been a side conversation between two participants.

c. Try again! Involving the participants in another activity would have disrupted the flow of the webinar as stated in the agenda.

5. Several participants asked questions that were not related to the discussion topic throughout the webinar. Tyrese spent several minutes answering an off-topic question in detail. Amy saw he was beginning to lose the rest of the participants when she saw a downturn on the engagement meter on the producer screen. How could this have been avoided?

a. Try again! Ignoring the questions could have demotivated participants.

b. Try again! Providing abbreviated responses could have demotivated participants.

c. **Correct! A parking lot would have been a useful tool to store and track items to be addressed later.**

## After the Webinar

### Evaluation Planning

After your webinar, you should conduct an evaluation. Evaluation is one of the six professional development practices and critical for improving future efforts.

Carefully consider how evaluation data will be used and by whom when planning the evaluation of a webinar. This will help you focus the evaluation on the items for which you (and other relevant stakeholders) plan to take action based on participant responses. Identify the topics where feedback is needed the most. This could include facilitator effectiveness, content, technical components, handouts, timing, and interactivity.

Develop a plan before the webinar for securely and efficiently collecting, storing, analyzing, and reporting evaluation data.

There may be options, such as polling features, for collecting evaluation data in the webinar platform. Otherwise, an outside mechanism may be needed for collecting data. This could include linking to survey software or asking participants to respond to a set of emailed questions. Consider whether is it important for your participants to be able to respond to the evaluation anonymously. Regardless of the data collection method used, build time into the agenda, prior to the closers, for participants to complete the evaluation form.

PD101 discussed how recent studies have shown that traditional pre- and post-questionnaires can misrepresent the impact of training. A better approach is the retrospective pre-post method in which participants complete one questionnaire at the end of the training. In this questionnaire, they are asked to retrospectively assess their knowledge or skill level prior to the event and then assess it now, afterward. This reduces participant bias by presenting the same frame of reference to both pre- and post-questions.

Here are some general guidelines for designing a good retrospective pre-post questionnaire.

- Use concise instructions that clearly guide the respondent in what to do.
- Remind the respondent to provide two answers for each question: one for past assessment of knowledge, skills, and attitudes and one for a current assessment.
- Place the pre-training question first on the form, and
- Format the questionnaire in a way that helps respondents understand what they are being asked to do. For example, use shading, font styles, and question layouts that call attention to the pre-post ratings.

If using an evaluation form, be sure to include options for both qualitative and quantitative responses.

**Qualitative** responses can be both direct and open-ended responses. These give participants the chance to not only give honest and direct feedback in their own words, but detailed comments of information you may not have addressed in other questions.

**Quantitative** responses can be closed-ended questions such as yes or no answers, checklists, and rating scales.

It is also possible to use questions that combine quantitative and qualitative responses.

Here are some guidelines:

- Make response options as clear as possible.
- Standardize response categories and scales to make them uniformly consistent.
- Avoid biased words or phrases and jargon.
- Avoid asking about multiple items in a single question (e.g., 'rate the sound and visual quality of the webinar').
- Involve those who will be responsible for data analysis early in the process to ensure a smooth transition from data collection to data analysis.

Remember:

- The easier it is for participants to respond to the evaluation, the higher the response rate will be.
- The more organized and automated the data collection process is upfront, the easier it will be to analyze data later.
- Ask questions that will inform future webinars or professional development events.

Download the *Data Collection Framework* for more information on developing evaluation questions. Also, visit www.cdc.gov/healthyyouth/evaluation/ for information on analyzing qualitative data.

**Reporting and Archiving Data**

Once the data has been analyzed, the findings should be shared with stakeholders involved in developing and conducting the webinar. These individuals should discuss ways to improve webinars in the future based on participant feedback.

Now that the webinar is complete, you should keep a record of it in your archives.

The first and most important step is one that we've already mentioned: remember to record the event! Most webinar platforms make recording as easy as clicking a button.

After recording the webinar, consider several options for distribution. Some recordings will produce a file or the platform has automatically generated a URL where your recording "lives." If the webinar was only open to invited participants, then the permissions of the recording need to be changed before you can share it with the public. Distributing the recorded webinar can be as easy as simply including a link to the recording in a follow-up email to participants.

Some of the more sophisticated platforms allow editing the recording prior to download. These features can save time; otherwise, use a separate video or editing software to trim unwanted parts of your webinar, such as dead air before the webinar begins.

To archive multiple webinars in one location, upload them to a dedicated website or share drive, or store them on USB drives to be distributed as physical media. Your individual strategy for archiving webinars will dictate the best means for distribution.

Each platform handles recording, editing, downloading, and distributing differently. Conduct research on how each platform's archiving system works to identify which one best suits your needs.

Before we conclude, let's review what we've learned about post webinar activities.

## Activity 5: Webinar Evaluation

Juan is interested in participant reaction to the Training Development Group's (TDG) webinar offerings. The TDG has developed an evaluation plan to collect, store, analyze, and report evaluation data as the basis for the evaluation component of each webinar.

1. TDG staff members are discussing the best time for participants to complete the evaluation form. Who has the most appropriate recommendation?

    a. Amy recommends using the webinar platform's polling feature to answer evaluation questions at the halfway point, which will also serve as an activity break.

    b. You recommend building time into the agenda, prior to the closers, for participants to complete the evaluation form.

    c. Tyrese recommends not taking time away from the content he needs to deliver and sending an e-mail message to all attendees after the webinar.

2. Amy would like to develop a traditional pre-post-questionnaire where participants are asked to complete questionnaires before and after the session to determine how much they have learned. Tyrese wants to develop a retrospective pre-post questionnaire where participants are asked to retrospectively assess their pre-knowledge and their current knowledge at the end of the webinar. Why is Tyrese's approach appropriate?

a.  It reduces participant bias by presenting the same frame of reference to both pre- and post-questions.

b.  It increases participant bias by presenting the same frame of reference to both pre- and post-questions.

c.  None of the above

3.  In a retrospective pre-post questionnaire, respondents are asked to provide two answers for each question. What do the two responses represent?

a.  One response represents an assessment of prior knowledge and skills; the other represents future goals.

b.  One response represents past opinions and beliefs; the other represents current opinions and beliefs.

c.  One response represents past assessment of knowledge, skills, and attitudes; the other represents a current assessment.

4.  Tyrese and Amy are developing the evaluation questions. Juan recommends a mix of quantitative (closed-ended) and qualitative (open-ended) questions. What is the difference between the two types of questions?

a.  Quantitative questions are associated with the overall number of responses anticipated. Qualitative questions are associated with the quality of responses anticipated.

b.  Quantitative questions can be answered by yes/no responses, checklists, and rating scales. Qualitative questions provide opportunities for respondents to give direct feedback in their own words.

c.  Quantitative questions can be ambiguous because respondents may interpret them in a variety of ways. Qualitative questions are less ambiguous because respondents are free to answer questions in their own words.

5.  Because Amy used a new platform and different equipment for this webinar, Juan is particularly interested in participant feedback regarding access and sound quality. One evaluation question asked respondents, "*Were you able to successfully log in to the webinar and hear the audio using your computer speakers or telephone?*" What is wrong with this question?

a.  Multiple items were addressed in a single question. While a participant may have been able to log in successfully, the participant may not have been able to hear the audio; therefore, separate responses may have been required.

b.  Nothing is wrong with this question. If answered, it will let the Training Development Group know whether participants were able to successfully log in to the webinar and hear the audio using their computer speakers or telephones.

c.  The question was written using biased words. Asking participants about their ability to "successfully log in" appears to question the participants' skill level.

## Activity 5 Answer Key

1.  TDG staff members are discussing the best time for participants to complete the evaluation form. Who has the most appropriate recommendation?

a. Try again! At the halfway point of the webinar, only half of the content would be considered in the evaluation. The second half of the content would be excluded.

b. **Correct! Building time into the agenda prior to the closers is an efficient way to collect data.**

c. Try again! Sending an e-mail message to all attendees after the webinar may have a negative impact on the rate of return.

2. Amy would like to develop a traditional pre-post-questionnaire where participants are asked to complete questionnaires before and after the session to determine how much they have learned. Tyrese wants to develop a retrospective pre-post questionnaire where participants are asked to retrospectively assess their pre-knowledge and their current knowledge at the end of the webinar. Why is Tyrese's approach appropriate?

   a. **Correct! This approach reduces participant bias.**

   b. Try again! This approach does not increase participant bias.

   c. Try again! The retrospective pre-post approach reduces participant bias.

3. In a retrospective pre-post questionnaire, respondents are asked to provide two answers for each question. What do the two responses represent?

   a. Try again! Neither response represents future goals.

   b. Try again! Neither response represents opinions and beliefs.

   c. **Correct! The responses represent past and current assessments of knowledge, skills, and attitudes.**

4. Tyrese and Amy are developing the evaluation questions. Juan recommends a mix of quantitative (closed-ended) and qualitative (open-ended) questions. What is the difference between the two types of questions?

   a. Try again! Quantitative questions are not associated with overall numbers, and qualitative questions are not associated with quality.

   b. **Correct! Quantitative questions are direct, whereas qualitative questions allow for more detail in participant responses.**

   c. Try again! Quantitative questions are not ambiguous, although respondents can answer qualitative questions in their own words.

5. Because Amy used a new platform and different equipment for this webinar, Juan is particularly interested in participant feedback regarding access and sound quality. One evaluation question asked respondents, "*Were you able to successfully log in to the webinar and hear the audio using your computer speakers or telephone?*" What is wrong with this question?

   a. **Correct! Listing multiple items in a single question is confusing.**

   b. Try again! Listing multiple items in a single question is confusing.

   c. Try again! This is not an example of using biased wording.

## Conclusion

### Summary and Wrap-Up

This brings us to the end of *PD201: From Basic to Dynamic*. We hope you have learned ways to help improve your webinar design and delivery. Before we conclude, let's review some of the main points.

### Adult Learning Theories

The three domains of learning are cognitive, affective, and behavioral. Most adult learners have mastered lower order processes in each of the domains. To successfully engage our audience, we must design our event to challenge adult learners on higher order processes.

The three main learning styles are visual, auditory, and kinesthetic. Maximize reach of the adult learners by incorporating corresponding facilitation styles into your event.

Optimize the effectiveness of your event by keeping in mind the differences between adult learners and child learners and designing it accordingly.

### Webinars

Webinars are online seminars, usually synchronous, that allow people to connect in virtual classrooms.

A variety of online web conferencing software or platforms can be used to host your webinar. Research platforms to determine which features are needed.

Ensuring good attendance requires inviting participants, getting them registered, and reminding them about the event.

When creating presentations for a webinar, use engaging visuals, including lists, graphs, fonts, video, audio, and animation, as appropriate.

Collecting and analyzing webinar evaluation data are necessary to improve future events.

Thank you for participating in *PD201: From Basic to Dynamic*. After completing the entire course (all 19 videos, about 90 minutes total time), you can download and print a Certificate of Completion.

## Resource List

### What is Professional Development?

Understanding Professional Development
https://www.cdc.gov/healthyschools/professional_development/documents/understanding_professional_development.pdf

### Before the Webinar - Preparations

Attention Spans https://www.scribd.com/document/265348695/Microsoft-Attention-Spans-Research-Report

Webinars with WoW Factor by Becky Pike Pluth

- The Bob Pike Group Webinars with Wow Factor https://www.bobpikegroup.com/blog/351

- The Bob Pike Group Consultant Details https://www.bobpikegroup.com/about/consultants/5

Webinar Platforms

- Adobe® Connect™ http://www.adobe.com/products/adobeconnect.html
- GoToWebinar® https://www.gotomeeting.com/webinar
- WebEx® https://www.webex.com/
- Skype® for Business https://products.office.com/en-us/skype-for-business/online-meetings

**Before the Webinar – Visuals**

OWL Purdue Online Writing Lab https://owl.english.purdue.edu/owl/resource/731/1/

The Webinar Blog: Web Conferencing Tips, News, and Opinions
http://wsuccess.typepad.com/webinarblog/2012/01/copyrights-and-fair-use-in-presentations.html

**During the Webinar**

The Zen of Facilitation https://learningforward.org/docs/jsd/killion133.pdf?sfvrsn=0

**After the Webinar**

Data Collection Framework
http://www.cdc.gov/healthyyouth/evaluation/pdf/sp_kit/data_collectiion_framework.doc

Adolescent and School Health Program Evaluation https://www.cdc.gov/healthyyouth/evaluation/

CDC's Evaluation Brief #19: Analyzing Qualitative Data for Evaluation
https://www.cdc.gov/healthyyouth/evaluation/pdf/brief19.pdf

CDC's Evaluation Brief #20: Analyzing Quantitative Data for Evaluation
https://www.cdc.gov/healthyyouth/evaluation/pdf/brief20.pdf

**Conclusion**

Certification of Completion