

BONUS: Engagement Pro Moves
You Can Use With Your Subject
Experts Inside!

Engaging Learners

A Guide To Successfully Designing Engaging Learning



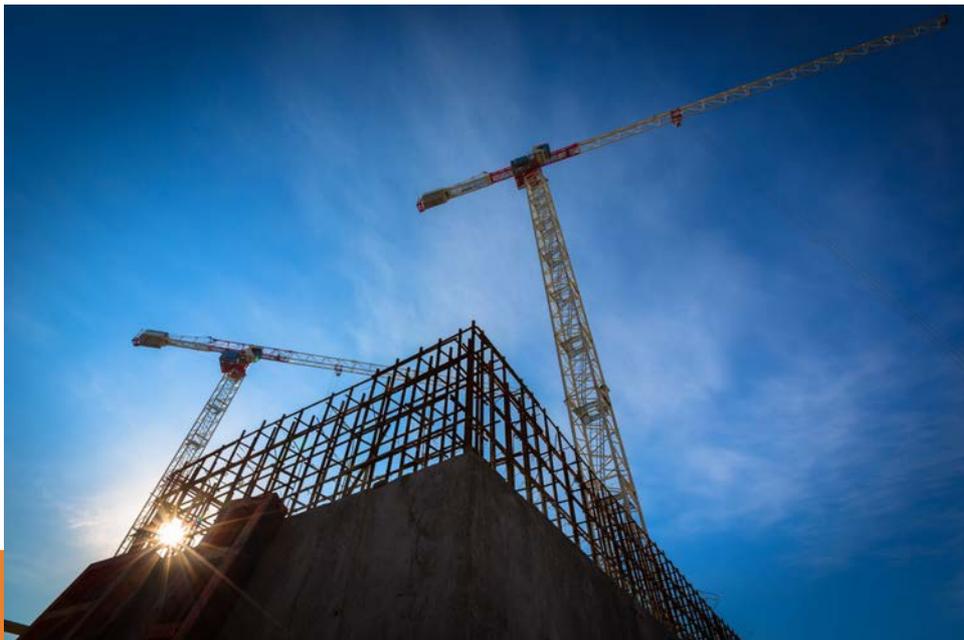
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A Tale of Two Speakers

Meeet Scott.

Scott is a meetings manager for a state manufacturing association. He's a young professional with five years of experience. Scott is responsible for the logistics of approximately 50 one- and two-day events a year. Having recently passed the CMP exam, his focus remains tactical. As Scott departs for the only approved professional development experience he'll partake in this year, he's excited - and a bit nervous - by the opportunity to deliver his first presentation at an industry conference.



Now meet Lindsay. Lindsay is an education director for a national construction association. She's a mid-career professional with more than 15 years of experience. Lindsay's responsible for the association's overall education portfolio, which comprises more than 150 in-person and digital learning opportunities a year. She manages a team of four - so her focus remains high level and strategic. As Lindsay departs for one of three approved professional development experiences this year, she reflects on her past presentation experience while finalizing the curriculum for her upcoming session.

Scott and Lindsay depart their respective associations and travel to the same event but take two very different approaches as conference speakers. Their experiences, as well as those of their learners, can be summarized as follows:

	Scott / Manufacturing Association	Lindsay / Construction Association
Speaker	<ul style="list-style-type: none"> • Hoped to demonstrate status as a thought leader • Reserved no time to explore audience thinking on topics • Content delivery was rushed and void of real-life stories 	<ul style="list-style-type: none"> • Yielded the floor to others with prior knowledge • Helped learners personally identify the relevance of content • Masterful storytelling helped illuminate key points
Learners	<ul style="list-style-type: none"> • Overwhelmed by the volume and speed of new information • Listened to a single speaker for 75 minutes and lost interest • Felt little connection to the content or how to apply it • No opportunity was provided to ask or answer questions 	<ul style="list-style-type: none"> • Gained new perspectives on three specific takeaways • Enjoyed a mental break while participating in a flipchart activity • Explored application of content through a relevant case study • Heard from multiple voices and expanded learner networks

Reflection

Now think back on past learning experiences you've enjoyed. What engaged you as a learner? Take a few moments to jot down your responses.

Findings

When asked the very same question about learner engagement, survey respondents shared with us a variety of ideas. Generally, those ideas could be rolled up into one of six categories:

Activities	Respondents valued a break in the speaker's delivery of content to allow them the opportunity to form pairs or small groups, possibly walk to a new location in the room, and then to work together on a case study, role play, flipchart or other "fun" activity.
Application	Respondents valued exploring how they might apply content and implement key takeaways upon return to their respective organizations. They appreciated speakers who stimulated thinking, encouraged problem-solving, illuminated applicability and bridged theory with practice.
Discussion	Respondents valued open and authentic discussion with speakers and peers on relevant topics, sharing and learning from one another's personal stories and experiences, and being challenged with provocative questions for consideration in both small- and large-group settings.
Instructors	Respondents valued passionate, skilled and relatable speakers who exude energy, commitment, confidence, enthusiasm and humor. They naturally gravitate to speakers who leverage the knowledge and experience of learners while also providing appropriate and timely feedback.
Motivation	Respondents valued speakers who helped them identify their own motivations for participating in sessions. This included challenging learner thinking on relevant topics, delivering solutions to current challenges, and identifying opportunities to be either more productive or more effective.
People	Respondents valued meeting new people and being exposed to new perspectives from fellow learners, growing their networks in both fun and professional ways, sharing successes and challenges with peers, and collaboratively building on ideas to generate real-world solutions.

We'll explore more about what actually contributes to learner engagement in a moment. In the meantime, let's unpack the metaphor introduced earlier by Scott and Lindsay.

Metaphor

Throughout this eBook, we'll reference both manufacturing and construction as a metaphor for learner engagement.

Specifically, construction is defined as the process of constructing a single building for a known client or audience. Manufacturing, on the other hand, typically involves mass production without a designated purchaser.

Consider the learning programs developed by your organization. Which image best represents your current approach?



Manufacturing Learning Experiences

- Events generally resemble one another both in terms of form and function without a defined mission.
- The audience is defined simply as “the membership” or some other broad stakeholder category.

Constructing Learning Experiences

- Each event is uniquely built upon a clearly defined mission statement and set of learning goals - which may entail coordinating multiple learning touchpoints.
- The audience for each event is clearly articulated and personas are fully developed.



As you take the time to reflect on your organization's approach, it's easy to be fooled. High production values, elaborate stage sets, high-quality food, free-flowing bars and flashy logistics can often return false positive results. While the events are likely visually impressive and the participants themselves may appear to be satisfied, the learning and networking elements are often lagging. And, of course, this severely impacts **return on learning** - a performance measurement used to evaluate the efficiency of an organization's learning investments.

So ask yourself this question: ***Is your association in the learning business?***

If the answer is yes, the narrative must shift from a misplaced emphasis on chicken, chairs and water to one that truly values the selection and coaching of speakers to successfully prepare and deliver content utilizing brain-friendly techniques. In this reimagined learning environment, learners are not an afterthought, but rather an integral consideration in the design and delivery of sessions – whether in person or online.

Why You Should Care

No matter where you find yourself within your organization - at any level, with any range of experiences and with any variety of responsibilities - we know the discussion often boils down to dollars and cents:



- How many attendees can we register for each program?
- How many more attendees can we register this year over last year?
- How much money is each program going to make?
- How much more money can we make this year over last year?

The transformation that can result from shifting the narrative from manufacturing to constructing is significant:

Manufacturing	Constructing
<ul style="list-style-type: none">• Over time, learners become bored with the status quo• Learners are unclear of the intended outcomes, resulting in lackluster interest and attendance• The event tries to be all things to all people, and ends up serving no one• Learners become disenfranchised from the organization and slowly drop membership over time• Learners become distrustful of the association and see little value in other organization assets	<ul style="list-style-type: none">• Over time, learners are surprised and wowed by new/different experiences• Learners achieve and exceed intended outcomes, resulting in significant repeat attendance• The event serves a unique audience that results in a cult following• Learners become more engaged in both the event and the association, resulting in lifelong members• Learners are compelled to purchase additional products, programs and services from the organization

While the quality of any single event cannot magically improve overnight, an association and its learning department can rebuild both its brand and its reputation over a three to five-year period of time. With time, energy, expertise and effort, presentations can begin to look more like Lindsay's than like Scott's. And the dividends are invaluable to the learners, the speakers, the conference, the organization and the industry.

The subsequent sections of this eBook will not only shed light on effective strategies for making this shift, but will deliver real-world tactics you can immediately put into practice.



What Learner Engagement is **Not**

Engagement. We know we want it. That's a given. But with the ambiguity surrounding what it really is, how do we develop and deploy strategies we're confident will result in engagement? And to what end? Is all engagement created equal? While we begin with more questions than answers, fear not. We'll get to the bottom of this engagement mystery together.

Common Ground

You've no doubt heard the word "engagement" used in a number of contexts. In fact, you may even find yourself in the camp of association professionals petitioning to officially ban the word from the English language. No matter your feelings on the word itself, let's pause to reflect upon your own experience with engagement both within your organization and as part of your education programs.

As you briefly answer each of these two questions, jot down your thoughts. A sentence or two (or even a keyword or two) will help jumpstart your learning journey around this important concept. Remember, learner engagement is a key driver in growing the participation, reach and value of our education programs. Here, we're specifically interested in your thoughts on what engagement is and how to identify successful engagement outcomes.

What is engagement?

How do you know it's been successful?

Notes:



If you said easy...

It's likely this discussion will open your eyes to new ideas and approaches to engagement you've not yet considered.

If you said difficult...

You're absolutely not alone. This is complex and challenging work that's often pushed to the bottom of the task list (if at all) behind a laundry list of other to-do items.

How did that feel? Along a continuum of "difficult" at one end and "easy" on the other, where would you place yourself? Be honest.

The good news is this: engagement is not an impossible endeavor. With a clear definition and a handful of simple strategies, you and your speakers can design and deliver education experiences that foster behavior change and result in performance improvement – the new platinum standard for association education.

Survey

When implemented correctly, engagement should grow the participation, reach and value of our education programs. But until we all agree upon what engagement is, the finish line (and the benefits associated with crossing that finish line) will continue to elude us.

In an attempt to create a unified definition, to illuminate best practices and strategies that truly engage learners, and to identify real-world examples of engagement done right, we prepared and launched a 10-question survey. The survey questions read as follows:

Learner engagement questions

1. What is engagement?
2. How do you know when “engagement” has been successful?
3. How is digital and face-to-face engagement different?
4. Thinking back on learning experiences you’ve enjoyed, what engaged you as a learner?
5. How do you build engagement into your education programs?
6. How do you coach/mentor speakers to achieve engagement?
7. What next steps do associations need to take to elevate engagement in their education programs?

Demographic questions

8. My role in the association education industry is best described as which of the following?
9. My years of experience are best described as which of the following?
10. If you’d like us to send you the survey report, please let us know how to reach you (e.g., name, company and email address).

The survey was open for a period of 31 days. Responses were solicited via blog posts, online community discussion posts, newsletter articles, social media posts and other outreach to our personal and professional networks. All told, 60 respondents participated in this groundbreaking survey – the first ever of its kind.

Demographics

While we certainly hoped for greater participation in this survey, the respondent pool pleasantly surprised us. Respondents reported their roles within the association education industry as follows:

- Association education director (16);
- Association education manager or staff (11);
- Association executive directors (9);
- Consultant (9);
- Association chief learning officer (7);
- AMC professional (5);
- Association meetings director (4);
- Association meetings manager or staff (3); and
- Vendor (2).

Respondents who indicated their role as “other” represented functional areas in certification, communications, component relations, corporate relations, leadership development, marketing, membership and operations.

When asked to share their years of experience, respondents offered the following:

- More than 20 years (21);
- 15-19 years (19);
- 5-9 years (17);
- 10-14 years (11); and
- 1-4 years (9).

Ultimately, the distribution of responses – both in terms of role and in terms of seniority – seems to lend validity to the data (in that it’s representative of the broader association education industry).

Misconceptions

In sifting through respondent data, we identified very quickly a number of misconceptions surrounding learner engagement. Moving forward, when we talk about engagement, we're **not** talking about:

- Activities – something that a person/group does.
- Attendance – being present during the session.
- Contribution – giving one's view in a discussion.
- Conversation – formal exchange of ideas by spoken word.
- Interaction – working with a neighbor or in a small group.
- Involvement – simply participating or note taking during the session.
- Nonverbals – visual communication cues (e.g., body language).
- Novelty – taking notice of something interesting/important.
- Participation – taking part in something.
- Sharing – high volume of social media posting.
- Satisfaction – fulfillment of wishes, expectations or needs.
- Member, program, stakeholder or volunteer engagement.

Each of these tactics can play a contributing factor in learner engagement; however, each tactic on its own cannot be defined as engagement.

The last entry – member, program, stakeholder or volunteer engagement – is particularly important. While there are overlaps, there's a marked difference between learner engagement and each of these other engagement types.

When we talk about learner engagement, we're specifically talking about the engagement of learners during a learning episode - much like the ones facilitated by Scott or Lindsay.

Additional, but decidedly different, forms of engagement include:

Member Engagement	Program Engagement	Stakeholder Engagement	Volunteer Engagement
Engagement of a member with the association and its comprehensive portfolio of programs, products and services.	Engagement of a learner, speaker, sponsor, exhibitor or advertiser with the overall elements that comprise a program, such as the meal functions or exhibit show.	The process by which an association involves people who may be affected by the decisions it makes, or can influence the implementation of its decisions.	A collaboration between staff and volunteers for an intended and measurable result.

Missing Piece

A discussion about engagement simply cannot continue without defining the term. Following are just some of the dictionary definitions we found during our research. Each provides a unique clue about the concept. But like a puzzle missing one or more pieces, each individual entry is ultimately incomplete on its own:

- Occupy, attract or involve (someone’s interest or attention);
- Cause someone to become involved in (a conversation or discussion);
- Pledge or enter into a contract to do something (e.g., a learning contract);
- Participate or become involved in; and
- Establish a meaningful contact or connection with.

At the end of the day, when taken one by one, each of these definitions is likely to blame for the confusion surrounding learner engagement. In fact, many of them directly link up to the misconceptions found in our survey responses.



If we turn back the time a bit farther to examine the origin of the word “engagement” we find the following:

- Late Middle English (formerly also as *ingage*);
- From French *engager*, ultimately from the base of *gage*; and
- The word originally meant “to pawn or pledge something,” later “pledge oneself (to do something),” hence “enter into a contract” (mid 16th century), “involve oneself in an activity,” “enter into combat” (mid 17th century), giving rise to the notion “involve someone or something else.”

Red Flags

Finally, a few respondent remarks bubbled to the surface as significant red flags in our pursuit of learner engagement. They are as follows:

1. *Our members don't like engagement.*
2. *It's pretty tough to build engagement into our presentations due to the type of content that's being facilitated.*
3. *We don't have the resources to concern ourselves with engagement.*



Whether we're able to fully convince you otherwise, allow us to briefly provide another take on these commonly held beliefs before we definitively define learner engagement.

- Members often don't like "interaction" or "engagement" that feels prescriptive (e.g., icebreaker activities or new flavor-of-the-month approaches with little rhyme or reason). True learner engagement, however, is not something to like or dislike - it's simply a brain-friendly approach to content delivery.
- You're likely familiar with the axiom, "You can lead a horse to water, but you can't make him drink." Successful engagement is the same way: It can't be forced. Rather, learners should be invited and motivated to engage (e.g., through the introduction of relevant content).
- Like a sponge, learners have a finite capacity to absorb. Therefore, speakers should present just what learners need to know vs. everything there is to know. To create a more successful environment for engagement and knowledge acquisition, all other content should be packaged within a learning pathway or as supplementary resources.
- Legal and technical content, just as any soft skills, can be handled in exactly the same manner. Here, a guide on the side - where the emphasis is on the prior knowledge and experience of participants - is always more successful at engaging learners than is a sage on the stage.
- Failing to identify and secure the necessary resources to create and support learner engagement will cause competitors to quickly box your association out of the market.



Ultimately, we believe that learner engagement involves an intentional and active partnership with the learner to first personalize and process new information (simple exposure is not enough) and to then facilitate application which leads to behavior change in the workplace. A more detailed definition of learner engagement will be presented in the next section.

What Is Engagement?

Snapshot of an Engaged Brain

Our brains are constantly bombarded by sensory inputs. Because brains cannot process everything at once, we have developed sophisticated mechanisms for sorting and prioritizing what will win our attention. As a result, we habituate some environmental cues - no longer noticing the humming of the fridge or the noon train whistle. We also develop habits executing routines, like tying our shoes or the sequence of steps we take between picking up our keys and backing out of the garage, through memory automation triggers freeing up cognitive resources to think about other things. If we had to actually think about each step within our routines, we'd have no room to process what is going on around us.

At any given moment, our learners are steeped in an input crossfire. Their thoughts, emotions, physical condition, environment, push notifications, and any variety of internal and external inputs, accompany them into the “classroom.” How we design learning greatly impacts whether our training captures attention and remains the cognitive priority moment to moment. While we can't control what learners bring with them to a learning session, we can influence the learning environment and how we craft a learning experience.

A moment ago when you reflected upon what has engaged you as a learner -- what gripped your attention, sparked your interest, and motivated you to dig in and do the work of real learning?



Our survey respondents offered recollections that fall into three categories:

Attention	Interest	Motivation
<p><i>Strategies that capture and direct learner attention.</i></p> <p>Examples: tapping emotion, curiosity, patterns, or surprise.</p>	<p><i>Strategies that trigger learner interest, connecting the content to what is relevant and meaningful to the individual.</i></p> <p>Examples: connecting content to prior knowledge, tapping values, developing relevant associations with learner's needs.</p>	<p><i>Inspiring intrinsic motivation through opportunities for autonomy and social construction in learning.</i></p> <p>Examples: choice, discovery, problem solving, feedback, self-expression, challenge.</p>
<p>"A captivating and passionate teacher"</p> <p>"Creativity and novelty"</p> <p>"Personal stories"</p> <p>"Visuals"</p> <p>"Humor"</p>	<p>"I was interested in the topic"</p> <p>"The content was relevant to a problem I was solving"</p> <p>"An aha moment"</p> <p>"The presentation addressed my needs - I left with ideas I can use"</p> <p>"Connecting why something works vs. doesn't work"</p>	<p>"It was challenging! It made me think."</p> <p>"Opportunities to discuss, share and refine ideas"</p> <p>"Meeting new people and learning from their perspectives"</p> <p>"Feeling my contribution mattered"</p> <p>"Role playing a scenario and then debriefing - sharing feedback about best approaches"</p>

Any of these responses mirror to what came to mind for you?

According to learning science, all three of these levels are necessary to truly reach learner engagement. It starts with capturing learner attention, which is that neurocognitive mechanism of prioritizing inputs. Once we've grabbed the learner's attention, we have the opportunity to trigger interest by connecting what is relevant and meaningful about the subject to the learner. At this point we have established initial engagement, but to maintain focus we must motivate learners by getting them involved in the learning process.

This is moment when we begin to notice the manifestations that we often associate with engagement: participation, leaning in, eye contact, and sharing insights.

When we asked survey respondents "How do you build engagement into your education programs?" the overwhelming response was including more interaction. Given the actual conditions reported by our sample, this seems more a vision than a reality.

How can we shift this vision from idea to execution?

If you really want to get learners engaged, give them a problem to solve.

Too often, we don't present problems to learners, we present content. A focus solely on content doesn't lead to deep thinking or learner engagement. Karl Kapp, Bloomsburg University



A New Definition of Engagement

Learning science reveals that learner engagement involves an intentional and active partnership with the learner. The first step is to personalize and process new information -- simple exposure is not enough. Next, the learner must be motivated to try, apply and refine new ideas and skills in the context of practice, resulting in changed behavior.

Let's break it down.

Active Partnership

According to Peter Brown et al. in *Make It Stick*, “The responsibility for learning rests with every individual.” In other words, engagement is not something that a speaker can “do” to a learner. Learners must be receptive. Content leaders must be prepared to bolt on new learning to where the target learner’s understanding leaves off.

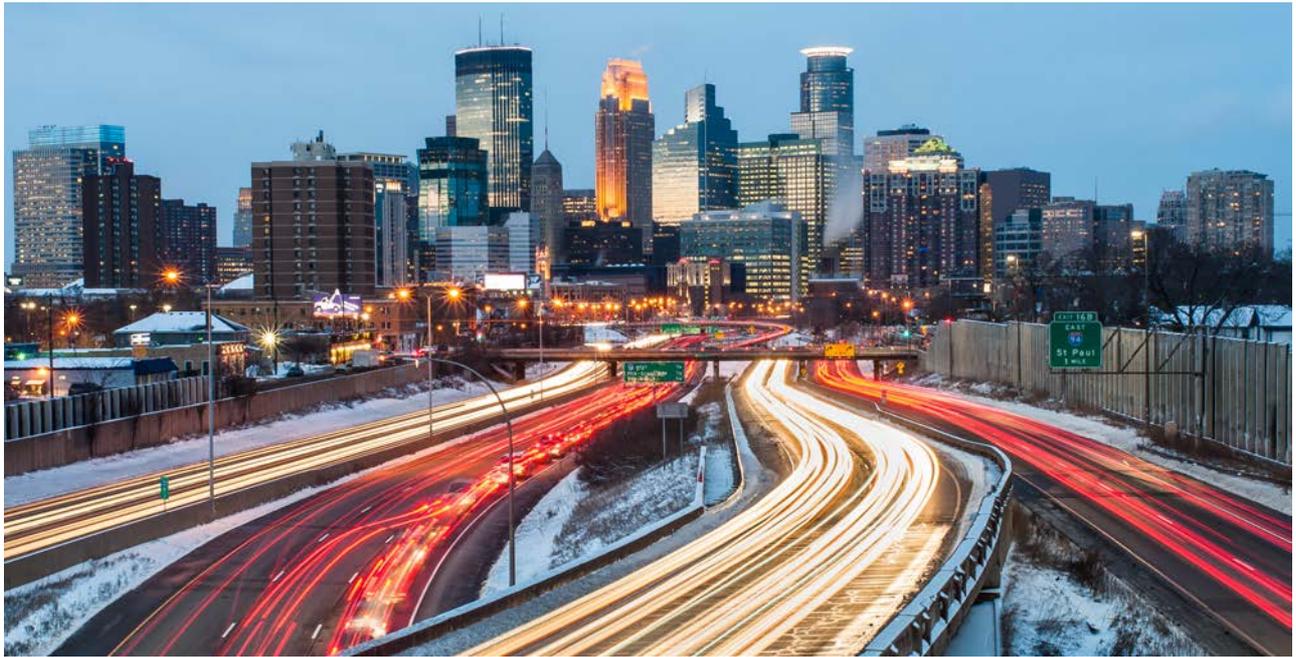
Personalization

Simple exposure to content is not enough, we must employ strategies to help learners personalize and process information, so they know where it deepens their understanding and what they can do with it. What we have commonly called engagement are in fact activities -- the technologies we use to shift passive presentations (lecture) into active learning. The activities themselves are not engagement. And in order to trigger engagement they must be meaningful, relevant, and appropriately challenging. They must be purposeful.

Application and Behavior Change

Another key feature of our new definition is application and the resulting change. True learning is change. When we learn something new, physical change occurs in the brain as attitudes, knowledge structures, skill, and competence changes. Rarely does a single conference session or online learning module encompass an entire learning cycle. Rob Brinkerhoff’s research tells us why: We pour too many resources into developing a session and not nearly enough in post-event follow up where the majority of actual learning happens -- when we try new ideas. To facilitate transformational learning, we must reach into the context of application and offer transfer support.

Without engagement there is no learning. Let’s take a look at the Learning Cycle to see how engagement fits within the context of learning design.



The Learning Cycle

Think about all the subjects you've developed knowledge and skill around as high-rises in a city. Everything you know about cars is a building. Everything you know about French cooking is a building. Everything you know about your line of work is a high-rise. Everything you know about public speaking is another. All of these subjects are different size buildings within your cityscape of knowledge reflecting the height of your competence in that subject. You may have five well developed floors in your knowledge about cars, twelve floors worth of mastery in your line of work, and potentially you're just now laying a foundation for a building representing instructional design - a skill you know will come in handy working with faculty on their sessions. When you learn something new about any of these subjects you're either adding nuance, like some nice furniture or art on the top floor, or you're scaffolding an additional floor elevating your understanding a whole new level. And we know when we're installing an addition, we have to first frame it out before we can hang sheetrock or even talk about paint color.

This is very similar to the learning brain, physically and metaphorically. We start with a foundation and a blueprint. We scaffold the structure of knowledge we intend to impart, and we fill it in piece by piece until it's complete. We can't start with the roof or the appliances or the travertine tile - we start with the learner's foundation and build a new structure upon their leaving off point. Your learners may have four well developed floors in the content domain you are delivering and are ready to frame out a fifth. Three things are required to get construction underway.

- **First**, you've got to understand your target audience. You can't offer them seventh floor content when they are working on finishing floor four.
- **Second**, you've got to identify the change you want to see in the learner. That means your learning objectives serve both as a measuring tape (that learning happened) but also as your general contractor dictating the A and Z points your training will fill.
- **Third**, you've got to employ the learning cycle in your design to ensure you engage your learners hammering up these new rooms with you.





Brains must follow a four-part process in order to learn something new: Attend, Analyze, Associate, Apply. Often learning design models begin with Engagement. This has led to a deeply entrenched misconception that engagement is something that happens at the beginning of a course. A witty joke, startling statistic, or impact graphic will do the trick! Boom! Engaged! Unfortunately, that's not how it works.

The learning cycle begins with **attention**, the cognitive process of filtering inputs determining what we will pay attention to and what we will ignore. As learning designers, we need to realize that attention is not captured once and done. We must manage attention throughout a presentation. Engagement at this stage means our design must address how we will capture and direct focus throughout the learning experience. This is why learning designers employ tactics that grab *attention*.

Once we attend to something new, we **analyze** whether it connects to something we already know (Think: knowledge high-rises) and is personally relevant to us. Our working memory is engaged in this phase of the learning cycle as we seek to connect this new information to prior knowledge to determine if it belongs in our priority processing queue. If we make connections, it moves on for further processing. If the input doesn't make sense or doesn't seem to connect to what we know or care about, we quickly move onto the next best input (often checking a smartphone). Engagement at this stage means our designs must address how we will structure content to connect with our learners. This is why learning designers employ tactics that trigger *interest*.

The third step in the process is where the potential for long term memory comes into play. The **associate** phase is when we reflect upon content and integrate it into our existing knowledge high-rises, building new memories. This is when we generate new ideas about the knowledge area as our understanding deepens. This is when we prepare to apply this new skill or competency in the real world. Engagement at this stage means we build in reflection and discussion to spark complex thinking, moving new knowledge from the abstract to our concrete reality - allowing learners to personalize their high-rise. This is why learning designers employ tactics that stimulate learner *motivation* through conversation.

And finally, we must **apply** what we are learning. Often learning models end with "assessment," as if testing is the final step in training. Assessment is a good tool for identifying learning advances and gaps that still need to be addressed, but it's not a phase in the learning cycle. The apply step implies more than evaluation. It requires we move beyond thinking about new ideas to synthesizing them into changed behavior. The experience of applying, which includes trying, failing, problem solving, refining, rehearsing, discovering new approaches, and trying again, forges powerful connections in the brain. ***This process is required to achieve mastery.*** The learner must walk away from a learning episode not only with a new perspective, but the knowledge, skills, and abilities to apply the new perspective to the workplace. Engagement at this stage means facilitating opportunities for acting upon new learning as an extension of the learning episode. This ultimately prepares our brains to attend when the next piece of knowledge we need to bolt upon our understanding enters our input field.

How Engagement Works

Neurobiologically, learning is not an event. Learning is a continuous process. And engagement is woven through each of the phases of the learning cycle. Our design choices impact how effective the learning experience will be.

Instructional design comprises all the decisions required to transform information into a learning experience. As Ruth C. Clark eloquently expresses in her book *Evidence Based Training Methods*, **“Content covered is not content learned.”**

Learning is not an event. Learning is a continuous process.



Now that we understand how brains acquire new knowledge and skill mastery, designing a learning experience should conform to these innate processes. Let's address fundamental questions we must ask when designing learning.

Case Scenario: Ethics is fundamental to our industry. While the topic comes up frequently in presentations, we don't presently offer case-based ethics training to our members allowing self-assessment and skill building. This has risen as a content priority because we have noted ethics is a gap in the training we offer to support our certification, and infractions within our industry have been reported in the news. The Board has directed the association to offer ethics training.

What's your first step?

Learning Design Questions



What are the objectives for this learning episode?

If you're creating a learning series, you'll have an overall outcome objective and each learning episode will feature its own objectives to help learners reach that final target. The objectives must be articulated as what the learner will be able to accomplish having participated in the learning episode. Objectives are not a speaker-focused agenda for the session. Ensure the learning objectives are measurable -- and pause at this stage of your design process to plan how you will measure success. If our objective is to ensure mid-level professionals design processes and controls to ensure appropriate ethical boundaries for their team, how will we design learning to achieve this goal and measure this capability?

Consider this: Planning how we intend to measure learning objectives before designing content allows us to strategically develop experiences and resources that will support achieving our outcomes vs. just measuring satisfaction.



How will I grab attention and maintain focus?

We know what our training goal is, who we're targeting, and what we want to achieve with this learning episode. Now we're ready to design content. Consider what methods would be most effective for engaging the brains of these particular learners.

Consider this: This design question connects our content with the Learning Cycle Attend step. In the design of our course, we must consider ways to harness the attention of our learners and help them maintain focus upon what is important to achieve the learning objective.



How will I structure content to connect with the learner?

Because we know who our target audience is for this learning episode, we can approximate where their knowledge high-rise is on this subject so we know exactly where to build new content. Learners become motivated to stay engaged when they sense content is relevant to them -- extending what they know in new ways.

Consider this: This design question connects our content with the Learning Cycle Analyze step. Employ visuals and interactions to help learners connect what they know to what's new.

Learning Design Questions, *Continued*



How will I create space for reflection, sparking complex thinking?

When speakers tell you they don't have time for interaction because there's so much to cover, call a timeout. Recall information covered is not information learned. In fact, too much information is detrimental to learning because overloaded brains reach an auto-off threshold. Adult learners require reflection and interaction to transition ideas from working memory to long term memory. These processes also allow learners to personalize content - discerning how they may use the new knowledge or skill. Reflection is not optional. It's a requirement for sustained engagement and for learning to happen.

Consider this: This step connects our content with the Learning Cycle Associate step. Employ reflection pit stops, peer idea refinement, and class interactions to forge these critical connections and personalize the learning.



What exercises or tools will we offer for practice and mastery?

If there is no resulting change from our learning programs, we have failed. The finish line is when the gap we identified is closed, *not when content is delivered*. And since a large proportion of learning happens when we try, fail, refine, and apply, it's imperative our learning design support concept application and skill building. Adult learner brains light up with engagement when they are appropriately challenged, see progress, and feel confident applying a new skill within the context of practice.

Consider this: This step connects our content with the Learning Cycle Apply step. Begin practicing within the learning episode so that the expert can offer immediate feedback. Offer opportunities to extend practice into the workplace where learners will use the content by providing tools, exercises, or additional learning touchpoints.

Case Scenario Reflection

How did working through these learning design questions focus your approach to ethics training in our case example?



#TRUTH

Are you crediting learning or attendance?

*“The widespread practice of awarding credit and certificates at the end of instruction sends entirely the wrong message. It implies “You’re done; no more is expected of you.” In fact, the real work -- that of transferring the learning and using it to improve practice -- only begins when the class ends.” Ray Pollock, et. al. **The Six Disciplines of Breakthrough Learning***

Learning Design Pro Moves

Learn more about instructional design in the resources at the end of this eBook or by participating in skill based learning with ATD and other reputable learning design education providers. To get you started with techniques instructional designers use to engage learners through the entire learning cycle, consider these ID Pro Moves that follow.

Once you’ve identified your gap, target audience, and learning objectives, consider these options to drive authentic learning. Each ID Pro Move tactic below includes a tip for implementing it effectively and a trap to avoid derailing your efforts.

Caution: These instructional design pro moves can be effective components of your learning design. However, they are not copy-paste engagement levers; one size does not fit all in learning design. Consider how each of these interaction technologies can become an intentional asset for triggering attention, interest and motivation -- which result in engagement.

Consider: This sampling of learning design tactics is a starting point for designing engaging learning with intention. How could you support your subject experts designing their sessions to ensure the best practices of engaging learning design are adopted?

Learning Design Pro Moves

Tactic

Tip

Trap

Prime Learning

Offer pre-work with reflection questions. Ask learners to identify what they want to get out of the learning episode. This primes the brain to be prepared to learn and to connect content to their identified needs.

No direct link between the pre-work and the session. When pre-work is offered it must be addressed during the learning episode. Another trap is offering optional resources before the learning episode. If they are optional, offer them afterward.

Dissonance

Create opportunities for participants to experience doubt when trying to solve a case or issue. Present content and then debrief the solution. This allows learners to identify where their understanding leaves off so they attend to the content.

Avoiding discomfort. Giving away the answers before learners are ready to attach them to their own learning gaps misses a powerful opportunity to allow learners to personalize their own learning episode.

Start with Why

Tell the story of why the learning outcomes matter. Allow learners to choose which of the session objectives they find most important. This communicates the stakes and ups the relevance – priming brains to attend.

The wrong why. Not knowing why this particular content is relevant to this particular audience reveals a mismatch that can actually cause disengagement. Express succinctly why learning this is critical for learners to win their attention and investment.

Tactic

Tip

Trap

Think, Pair, Share

Pose a question for participants to think about. After allotted time, share responses with a partner. Then ask a selection of partners to share their insights.

Poor questions. Questions must be pertinent to the level of the learner and deepen understanding of the content. This interaction should result in aha moments.

Demonstrate

Instructor describes a skill and then demonstrates it to illuminate nuances beyond "textbook" understanding of the skill. Take it to the next level by involving a participant in the demo so they can share their reflection of the experience.

Not connecting the demo to the audience's experience. Ensure the demo addresses your audience's questions and highlights tricky areas for individuals of their learning level to successfully perform the skill independently.

Formative Assessment

Inquire what learners know about the subject prior to digging into the content. Provide reflective opportunities after the learning material has been discussed so learners can assess progress they've made toward mastery.

Not doing it. Take the opportunity to connect content to where the learner's understanding leaves off to engage brains to be fully present. Turn off the firehose and check in with learners to assess how it's going.

Buzz Group Problem Solving

Form groups of 3-5 participants. Pose a problem, allowing groups to work together 5-8 minutes on a solution. Facilitator should visit tables to answer questions. Debrief by allowing groups to share their solution, building insights as each group shares.

Poorly structured problems. Ensure pertinent information is included without distractor information. If the point of the activity is to distinguish priority information from distractor information, that may be achieved with a different learning format.

Tactic

Tip

Trap

Role Playing

Craft opportunities to try on a new process, practice a skill, or simulate application of key concepts.

Silliness. There's always room for fun in learning; just make sure the role play drives key points home and illuminates insights. Facilitator is responsible to help participants forge key connections at the conclusion of the experience.

Reflection

Offer moments of individual and/or group reflection to trigger critical thinking and ideas for how to use the content in practice.

Skipping reflection to deliver more content.

Action Planning

Throughout the session, offer learners opportunities to reflect and personalize content. Allow time before they leave the session to form a "what's next" plan to implement insights into practice.

Leaving action planning wide open with no structure. Give learners a focus such as: What do I want to achieve? Who can help? What's the first step? When will I do it?

Facilitated Summary

Ask questions such as: "What have I learned so far?" "How would you summarize today's session and key takeaway to a friend?" "What are you now capable of trying/applying?"

Waiting for the last two minutes – not allowing enough time to crystalize takeaways. Save time for participants to think, respond, and build upon one another's ideas. When this is truncated due to poor time management, the effect is lost.

Key Takeaways

Lessons Learned

At the beginning of our journey together we introduced you to Scott and Lindsay. You'll recall that Scott is a meetings manager for a state manufacturing association and Lindsay is an education director for a national construction association.

Let's consider, for a moment, if things had been different. What if Scott and Lindsay...



Didn't	Did
<ul style="list-style-type: none">• Didn't respond to a generic call for presentations.• Didn't arbitrarily select session content to present.• Didn't intentionally design curricula for their respective sessions.• Didn't present content with learner engagement as a guiding framework.• Didn't set learners up for successful application post-program.	<ul style="list-style-type: none">• Did get handpicked to deliver content based on need and expertise.• Did receive a list of three learning outcomes to frame their sessions.• Did get coached in brain-friendly strategies for delivering content.• Did fully understand and apply the principles of learner engagement.• Did leverage successful transfer activities to support implementation.

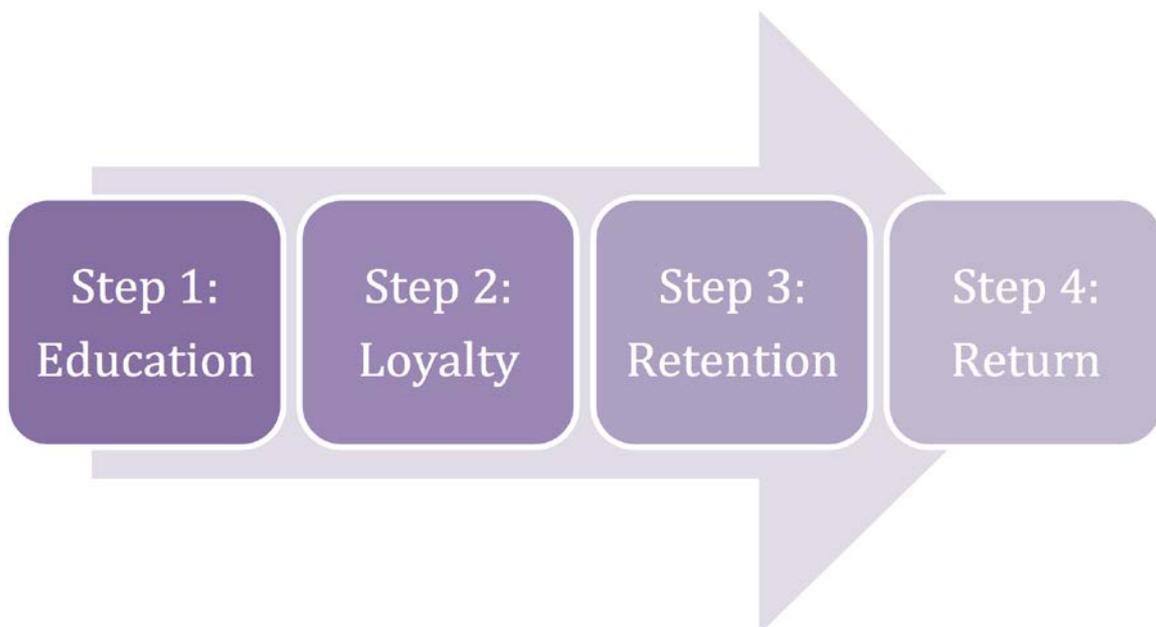
As we begin to assess our current education programs, it's both okay and expected to admit we're operating in an imperfect environment. Innovation - and the implementation of both basic and advanced instructional design tactics - is the long game. It's what we and our subject experts aspire to achieve, whether they currently know it or not. And it's perfectly acceptable to take just one small step toward the finish line at a time, just as long as we're moving forward.

Education Equation

In reviewing the qualitative data from our survey, it's apparent the association education industry has intuitions about what engagement is and should feel like; however, the picture is woefully incomplete. When it comes to the definition of engagement, intended outcomes, success metrics and steps for implementation, there appears to be considerable room for improvement.

Unfortunately, when we – as education professionals – build our learning portfolios upon misconceptions or incomplete information about engagement it can result in incorrect or misapplied strategies that can affect return both for the association and for our learners.

Consider the following education equation:



Step 1: Education, we elevate the quality and sophistication of our education programs through proper implementation and measurement of learner engagement.

Step 2: Loyalty, we earn attendee loyalty by building the reputation of our digital and face-to-face programs over the long term.

Step 3: Retention, we create a buzz around learner experiences that supports both repeat and first-time attendance.

Step 4: Return, we improve our association's bottom line, motivating the purchase of future programs, products and services. We also deliver meaningful return to attendees via new knowledge, skills and abilities that, when applied to their organizations, streamlines operations, attracts revenue and shrinks expenses.

Our return also results in deeper relationships with members leading to membership renewals – because we are fulfilling a key component of the organization's value proposition.

But without successful learner engagement from the outset, the equation falls flat. And since association members consistently rank training and professional development as one of the most important functions of an association, we simply cannot afford to ignore it.

As you make the case for a new emphasis on learner engagement, and on the construction of quality learning experiences, the education equation presents the clearest and most compelling argument to share with your supervisor or executive director.

Key Concepts

Throughout this eBook we've touched on a number of key concepts, but following are the three most important takeaways we hope to reinforce one final time:

Definition of Engagement	Learning science reveals that learner engagement involves an intentional and active partnership with the learner to first personalize and process new information (simple exposure is not enough) and to then facilitate application and behavior change in the workplace.
Intended Outcomes	The intended outcomes of successful learner engagement are threefold: <ol style="list-style-type: none">1. Develop an active partnership between speakers and learners.2. Learners personalize and process new information.3. Learners apply learning in practice resulting in behavior change.
Success Metrics	Learner engagement success metrics might include one or more of the following: <ol style="list-style-type: none">1. Achievement of learner outcomes.2. Recall of facts and basic concepts.3. Explanation of ideas or concepts.4. Use of information in new situations.5. Drawing connections among ideas.6. Justifying a stand or a decision.7. Producing new or original work.

Quick Start Guide

So, where do we begin? As you start to build a framework that better supports quality instructional design and, in turn, learner engagement, consider the following 10 ideas:

- 1 **Face innovation head-on.** Identify and commit to what's best for learners, not what's easiest for the association.
- 2 **Evaluate and elevate staff competencies.** Ensure all appropriate staff have fundamental knowledge of learner engagement and close any knowledge gaps with professional development opportunities.

- 3 **Create a collaborative staff culture.** Not all team members will be proficient in learner engagement strategies, and that's okay. Identify the strengths and weaknesses of the team, and leverage them accordingly.
- 4 **Partner with speakers.** Demonstrate a genuine partnership with speakers both for their own professional development, but also for the advancement of learners, the association and the industry.
- 5 **Calibrate speaker expectations.** Clearly outline in agreements the expectation that speakers understand and implement learner engagement strategies.
- 6 **Position speakers as facilitators.** Position all speakers more as the facilitator (i.e., the guide on the side), rather than as the beacon of knowledge (i.e., the sage on the stage).
- 7 **Develop subject experts over time.** Dedicate time, energy and resources to the development of subject experts as learner engagement experts.
- 8 **Educate learners on their role.** Teach learners about their obligation in the learning process by appropriately role modeling engagement strategies during sessions.
- 9 **Track impact post-program.** Establish learning outcomes for both speakers and learners, and evaluate both successes and improvement opportunities following each learning event.
- 10 **Create a community of practice.** Create optional communities of practice for speakers who wish to share methods, best practices and resources for successful learner engagement in between presentation opportunities.

Resources



Learn More About Learning Design
Develop classroom and eLearning instructional design skills here:
<https://www.td.org/>
<https://www.elearningguild.com/>
<https://www.learningsolutionsmag.com/>
<http://tracy-king.com>
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#Learning

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Access an annotated bibliography of learning resources at: <http://tracy-king.com/annotated-bibliography/>

Let Us Help You



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