Professional Development 101:
The Basics
Full Course Content

Contents

CHAPTER 1 – INTRODUCTION

WELCOME

Welcome to *Professional Development 101: The Basics*, the first 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 60 minutes to complete this course.

In this course, you will learn about the six Professional Development Practices developed by the Centers for Disease Control and Prevention's Healthy Schools branch, in partnership with Rocky Mountain Center for Health Promotion and Education, or RMC Health.

The Professional Development Practices can help increase your skill-building capacity in improving health and educational outcomes among youth.

The objectives for this course are to:
1. Define professional development and key professional development terms.
2. Identify the six professional development practices.
3. Identify strategies to support the professional development practices.

Throughout the course, you'll have opportunities to review, test your knowledge, and get more information.

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.

PD doesn't happen by chance. In order to improve organizational practices, you must consciously design PD processes and content with your organization's goals in mind.

Professional development should leverage adult learning principles to engage learners. That means following a systematic process that includes sustaining, designing, promoting, delivering, following up, and evaluating.

Offerings should be designed so that:
- Participants feel respected.
- The learning environment is safe and supportive.
- The content is relevant to participants' needs.
- Learning offerings are varied to address the needs of a diverse audience.
- Participants have opportunities to practice skills and apply new knowledge.

For more information about adult learning principles, theories, and learning styles, see the next course in the series, *Professional Development 201: From Basic to Dynamic*.

CHAPTER 2 – PROFESSIONAL DEVELOPMENT OFFERINGS

OFFERINGS

A professional development offering is a set of skill-building events designed to assist individuals in obtaining new knowledge and skills. PD offerings seek to accomplish specific objectives and improve workplace performance.

Offerings:
- Are targeted to a specific audience,
- Are centered on the learner, and
- Provide a call to action.

PD can be grouped into offering categories that are best suited for different goals and circumstances. Consider your specific needs and resources to decide what type of PD is most appropriate.

Is it expected that the PD take place during a single event, or will it be more of a continuous process over a longer period of time?
- If it is a continuous process, then **technical assistance** may be the appropriate PD approach.
- If it should be a single event, then you need to determine if it should be shorter or longer than three hours, based on the content.
    - If shorter than three hours, it will be an **information session**, such as a **webinar**.
    - If the content calls for an event to be longer than three hours, a training or workshop may be the appropriate PD approach.
        - If the goal is to help a small group learn and practice sustainable, long-term skills, then a **workshop** is appropriate.
        - If the goal is to help a group (especially larger groups) learn skills for immediate application, then **training** is appropriate.

Once you've determined the type of PD for the situation, you will need to decide if it is best to deliver the PD in-person, remotely (distance learning), or a mix of both.

We'll now look at each of these types of offerings in more detail.

TYPES OF OFFERINGS

The terms "training" and "workshops" are often used interchangeably. However, there are differences between training and workshops.

Training is an instructional experience provided primarily by employers for employees. Training can be provided to a **large group** of people at the same time. It is designed to develop new skills and knowledge that are expected to be **applied immediately** on the job.

Workshops are educational programs for a **small group** of people that focuses on techniques and skills in a particular field. Participants gain **long-term benefits**, such as sustainable skills.

A third type of event, one that incorporates characteristics of both training and workshops, is the **Training of Trainers (ToT)** model. The ToT model engages master trainers in creating new trainers for a particular topic or skill, or with training in general. The main goal of the ToT model is to **prepare instructors** to present information effectively, respond to participant questions, and lead activities that reinforce learning.

Information and Presentation Sessions

Another type of PD offering is information and presentation sessions.

These sessions are also tailored to specific audiences, but their purpose is to provide a *familiarity* level of knowledge on a specific topic. At the end of the session, participants have enough information to decide whether or not to pursue further investigation or implementation of the topic.

Information and presentation sessions can be delivered in a variety of ways: in person, online, or in paper-based formats. Sessions can be one-time events or a series of events. They are delivered in a short amount of time, usually between 30 minutes and an hour, but not more than three hours.

Webinars are a common example of information or presentation sessions. We will discuss webinars in more detail in the next course, *Professional Development-201: From Basic to Dynamic*.

TECHNICAL ASSISTANCE

The last PD offering we will define is technical assistance.

Technical assistance, also known as "TA" and commonly referred to as consulting, is the process of providing targeted support to an organization with a development need or problem. It is an effective method for building the capacity of an organization.

TA involves communication between a specialist or consultant and the organization. The specialist should be aware of the organizational culture and any specific circumstances related to the development need. TA is also typically delivered over an extended period of time.

In order for technical assistance to be effective, the specialist or consultant should adhere to a set of core principles.

Effective TA should be:
- *Collaborative*. Work jointly with the organization's staff to identify underlying needs.
- *Systematic*. Use an orderly approach.
- *Targeted*. Determine where technical assistance will have the greatest impact.
- *Adaptive*. Be flexible.
- *Customized*. Respond to the unique needs of the organization.
- *Results-driven*. Identify measures that indicate improvement.

The structure of how technical assistance is delivered varies. It can be one-on-one consultation or small-group facilitation (also known as coaching or mentoring). TA can be provided in person or by phone, e-mail, or other online methods such as Web-conferencing.

DISTANCE LEARNING

Distance learning is a mode of delivering instruction using technology to individuals who are separated by time, distance, or both. Distance learning technology has traditionally included methods such as mail correspondence courses or computer discs. Today, the most common delivery method is the Internet.

Like training and workshops, distance learning also has some variations. There are two modes of delivery: synchronous and asynchronous.

In **synchronous** delivery, instruction is conducted in real time. That is, all participants are present at the same time. Synchronous delivery most closely resembles a traditional classroom, despite the participants being located remotely. It requires an organized timetable and an instructor to be present. Participants can typically interact with the instructor, and they may even interact with each other.

In **asynchronous** delivery, instruction is self-paced. Participants access course materials on their own schedules and are not required to be together at the same time. Delivery technology includes video and audio recordings, discussion board forums, e-mail, and self-directed print materials.

Hybrid, or blended, learning is when synchronous and asynchronous technologies are combined.

This concludes our discussion of professional development offerings. In the next section, we will begin our exploration of the six professional development practices. First, let's take a minute to review.

ACTIVITY 1: PROFESSIONAL DEVELOPMENT OFFERINGS

Your organization has recently created a Training Development Group (TDG) that includes several new employees. Juan is the group manager. You, Amy, and Tyrese are training specialists in the group. The TDG is tasked with planning and implementing a new program that will provide a focused, systematic approach to Professional Development (PD) for employees. Juan is planning a meeting to discuss the various types of PD offerings your group may use in your PD program. He sends a meeting agenda ahead of time with several discussion topics. Review the following questions and identify the correct answers to prepare for your meeting.

QUESTIONS

1. Professional Development is a systematic process that strengthens how professionals obtain and retain what?
   a. Vision, purpose, and goals
   b. Accreditations and certifications
   c. Knowledge, skills, and attitudes
2. PD offerings should be designed so that:
   a. Participants are not put on the spot by being asked to practice new skills
   b. The learning environment is safe and supportive.
   c. All participants will be able to attend offerings in-person.
3. What is a difference between trainings and workshops?
   a. Workshops prepare instructors to present information effectively; trainings do not.
   b. Workshops provide a familiarity level of knowledge on a specific topic; trainings do not.

    c. Workshops focus on helping participants gain sustainable skills with long-term benefits; trainings help participants learn skills for immediate application

4. At the end of an information and presentation session, what will participants have?
   a. Enough information to decide whether or not to pursue further investigation of the topic
   b. New knowledge that can be applied immediately on the job
   c. The ability to present information effectively
5. Technical Assistance is/are:
   a. The process of providing targeted support to an organization with a development need or problem
   b. Educational programs for a small group of people that focuses on techniques and skills in a particular field
   c. An instructional experience provided primarily by employers for employees
6. Which of the following describes distance learning?
   a. It originated with the advent of the Internet.
   b. It delivers instruction to participants separated by time and/or distance
   c. It is always conducted in real time.

ANSWERS

1. Professional Development is a systematic process that strengthens how professionals obtain and retain what?
   a. Try again! This is not the main focus of Professional Development.
   b. Try again! This is not the main focus of Professional Development.
   c. **Correct! Professional Development is a process to strengthen how professionals obtain knowledge, skills and attitudes.**
2. PD offerings should be designed so that:
   a. Try again! PD offerings should provide opportunities to practice skills and apply new knowledge in a safe environment.
   b. **Correct! This is an important element of quality PD offerings.**
   c. Try again! Distance learning options can facilitate learning remotely so it is not always necessary for participants to attend offerings in person.
3. What is a difference between trainings and workshops?
   a. Try again! Training of Trainers do prepare instructors to present information effectively.
   b. Try again! Information sessions provide a familiarity level of knowledge on a specific topic.
   c. **Correct! Workshops focus on helping participants gain sustainable skills with long-term benefits; trainings help participants learn skills for immediate application.**
4. At the end of an information and presentation session, what will participants have?
   a. **Correct! Participants should have enough information to decide whether or not to pursue further investigation of the topic by the end of an information and presentation session.**
   b. Try again! Although participants may gain new knowledge about the topic during an information and presentation session, trainings focus on specific skills and knowledge that can be applied immediately on the job.
   c. Try again! Training of Trainers prepares instructors to present information effectively.
5. Technical Assistance is/are:
   a. **Correct! Technical assistance is the process of providing targeted support to an organization with a development need or problem.**
   b. Try again! This describes workshops.
   c. Try again! This describes training.

6. Which of the following describes distance learning?
    a. Try again! Distance learning technology has traditionally included methods such as mail correspondence courses or CD-ROMs. Today, though, the most common delivery method is the Internet.
    b. **Correct! Distance learning provides instruction to participants separated by time and/or distance.**
    c. Try again! Distance learning can be delivered synchronously or asynchronously.

CHAPTER 3 – PROFESSIONAL DEVELOPMENT PRACTICES

OVERVIEW OF THE PROFESSIONAL DEVELOPMENT PRACTICES

Let's turn our attention to an overview of the six professional development practices.

The PD Practices provide a framework and logical flow for a professional development program that emphasizes quality over quantity and is based on best practices.

Sustaining a PD infrastructure builds professional and organizational capacity. PD Practices allow you to **design** instructionally sound professional development offerings under optimal conditions. **Promoting** PD (formerly referred to as marketing) becomes more focused because of sustained contacts and consistent services. **Delivery** is streamlined to be responsive and timely. **Follow-up** efforts support growth to meet goals. **Evaluation** of the processes allows continuous improvement.

An organization's ability to achieve its mission improves when program staff receive the support needed to do their best work. Promoting professional development allows organizations to augment their professional capacity and improve outcomes.

When organizations follow the PD Practices, they can expect to see increases in measurable outcomes, including:
- Skills and knowledge;
- Implementation of programs, practices, and policies;
- Quality, quantity, or cost-effectiveness of programs, practices, and policies; and
- Sustainability of the infrastructure or systems that support programs, practices, and policies.

PARTNERSHIPS AND POTENTIAL OUTCOMES

PD partnerships between program staff and professional development providers should use a collaborative, team approach. This approach can help identify and prioritize PD needs, which in turn, leads to better focused and designed offerings. Effective PD teams share and build on previous evaluation results.

Characteristics of effective partnerships include:
- Mutual respect;
- Coordination of administrative responsibility;
- Reciprocal roles;
- Shared participation in decision making;
- Mutual accountability; and
- Transparency

As organizations grow in professional capacity as a result of an effective PD program, they can see outcomes such as:

- Increased contributions from program staff because of improved skills and knowledge;
- Synergy through collaboration;
- Increased program resilience; and
- Better alignment between staff professional goals and organizational goals.

Now that we've described the framework for the PD Practices and potential partnership outcomes, let's take a closer look at the individual practices. But first, let's review.

ACTIVITY 2: PD PRACTICES FRAMEWORK AND PARTNERSHIP OUTCOMES

Your Training Development Group (TDG) has been asked to brief the organization's leadership board on the fundamentals of a quality Professional Development (PD) program. Juan begins by explaining that the organization's new PD program will be based on the strategies found in the PD practices. Juan turns to you to answer the following questions posed by the board members.

QUESTIONS

1. Which of the following are PD practices?
   a. Sustaining, promoting, and evaluating
   b. Brainstorming, planning, and critiquing
   c. Framing, marketing, and reciprocating
2. Why should a collaborative team approach be used between program staff and PD providers?
   a. It helps identify strong team leaders.
   b. It helps with implementation of as many new offerings as possible each year.
   c. It helps identify and prioritize needs.
3. Which measurable results can we expect to see from the new PD program that will be based on the PD practices?
   a. Increases in participants' skills and knowledge
   b. Large increases in the quantity of PD offerings year-after-year
   c. Staff will increase professional capacities both within and outside of the organization's mission
4. Which characteristic describes an effective PD partnership between program staff and professional development providers?
   a. Strict division of administrative responsibilities
   b. Reciprocal roles
   c. Program staff receives input from PD providers and then makes all decisions independently
5. Which of the following is most likely to be an outcome of the PD program over the long term?
   a. A more fragmented organizational structure
   b. Less alignment between staff professional goals and organizational goals
   c. Increased program resilience

ANSWERS

1. Which of the following are PD practices?
   a. **Correct! These are three of the PD practices.**

b. Try again! These are not PD practices.
c. Try again! These are not PD practices.
2. Why should a collaborative team approach be used between program staff and PD providers?
    a. Try again! While leadership is important, the focus of collaboration is to identify needs.
    b. Try again! The number of offerings provided is not as important as the quality.
    c. **Correct! Identifying and prioritizing needs can lead to better focused and designed offerings.**
3. Which measurable results can we expect to see from the new PD program that will be based on the PD practices?
    a. **Correct! Participants' skills and knowledge increase as a result of using the PD practices.**
    b. Try again! A well planned PD program emphasizes quality over quantity.
    c. Try again! Although increasing professional capacity is important, the emphasis of a well-planned PD program is to ensure that PD offerings support the organization's mission.
4. Which characteristic describes an effective PD partnership between program staff and professional development providers?
    a. Try again! This is not a characteristic of an effective partnership because collaboration is an important element of partnerships.
    b. **Correct! This is a characteristic of an effective partnership because reciprocal roles increase the likelihood of shared participation and mutual accountability.**
    c. Try again! This is not a characteristic of an effective partnership because collaboration is an important element of partnerships.
5. Which of the following is most likely to be an outcome of the PD program over the long term?
    a. Try again! PD program outcomes include synergy through collaboration.
    b. Try again! PD program outcomes include better alignment between staff professional goals and organizational goals.
    c. **Correct! Increased resilience, synergy, and better alignment are potential outcomes of an effective PD program.**

PD PRACTICE #1: SUSTAIN

In the previous section, we briefly described the six professional development practices. Now, let's explore the first practice, **Sustain** a Professional Development Infrastructure, in more detail.

We can think of the PD practices in the same way that we think of the architecture of a house. The **sustain** practice provides the underlying foundation for all the other professional development practices.

A solid foundation establishes the standard of practice for a strong PD infrastructure, which leads to sustainable change.

Sustaining a PD infrastructure sets the stage for success through:
- Strong leadership;
- Advocacy for professional development;
- A skilled team of staff and trainers;
- Alignment with other organizational planning tools, such as your strategic plan or work plan; and
- A plan for evaluation.

Key Strategies

Key strategies to ensure a sustainable infrastructure include:
- Identify a person to provide PD leadership.
- Secure financial and human resources to support PD.
- Establish and implement a PD plan.
- Develop a recruitment, development, and assessment process to ensure use of qualified PD providers.

PD PRACTICE #2: DESIGN

The next practice we will cover is: **Design** Professional Development Offerings.

In keeping with our architectural analogy, the design practice can be viewed as the solid construction framework of the house. Solid PD offerings are thoughtfully designed with specific purposes.

The key to a good design strategy is to start with the end in mind. Know the specific outcomes you wish to see in participant knowledge, skills, or attitudes as a result of the PD offerings. Ask yourself:
- What, specifically, do I want learners to know and be able to do as a result of this training?
- What evidence would I accept to verify their learning?

The most common mistakes made during the design phase are:
- Unclear objectives,
- Too many objectives, or
- Too much content.

Clearly written, feasible objectives set the boundaries needed to guide and evaluate each PD event. Good objectives can help the PD team identify overabundant or irrelevant content that may leave participants feeling overwhelmed and complacent. Clear objectives let participants know what is expected of them and ultimately increase transfer of learning to the workplace.

Remember the acronym SMART when crafting your objectives.

"S" stands for *Specific*. The objective is clear because it answers the six "W" questions: Who, what, where, when, which, and why.

"M" stands for *Measurable*. You can tell when the objective has been achieved because criteria to measure progress have been set.

"A" stands for *Achievable*. The expectation set is feasible.

"R" stands for *Realistic*. Relevant resources, including personnel, finances, and time have been taken into account.

"T" stands for *Time-based*. It is grounded within a specific timeframe.

Key Strategies

Some key strategies for effective PD design include:
- Identify the target audience;
- Develop SMART objectives;
- Develop a comprehensive agenda; and
- Develop plans for evaluation and follow-up support.

PD PRACTICE #3: PROMOTE

Now we'll move on to the third PD practice: **Promote** Professional Development Services. This practice is also known as Market Professional Development Services.

Using our architectural analogy, once the house is constructed a realtor uses a promoting strategy to sell it. Similarly, you should also employ promotion tactics to capture the attention of your target audience.

Here are some tips to draw audiences to your professional development offerings:
- Know who your audience segments are (there could be more than one). If an audience segment is difficult to reach, you may need to go through a 'gatekeeper' or key influencer to reach that audience.
- Create robust databases of potential audience members to help you contact the right people. Evaluation forms can be an avenue to capture contact information from current PD attendees.
- Promote the benefits of your events. Articulate how participants will benefit and what they can expect to leave with.
- Utilize multiple advertising channels, such as mass emails or newsletters, to promote your PD events. Develop a standard template to help your audience recognize your communications.
- Identify best practices for promoting events to your specific target audiences. Research what tactics have been used successfully in the past and learn where your target audiences most frequently look for this type of information.
- Build partnerships. Involve other organizations that can lend credible, complementary expertise to your PD efforts. This can increase awareness of and interest in your offerings.

Your promotion or marketing campaign can range from low-cost, minimal time investments to costly, time-intensive efforts. Looking at the continuum from left to right, notice the lower end gives examples like smiles and enthusiasm. Moving toward the middle, you can see how effort increases. For example, developing fact sheets and information cards would be the mid-range in terms of cost and time. Finally, high-cost promotion options might be offerings like sponsoring events or developing displays for promotion booths.

Key Strategies

Key promotion strategies include:
- Determine your audiences' needs related to PD. Start with an audience profile or needs assessment for insights on interests and preferred communication mechanisms. Then, frame your messages and PD offerings accordingly.
- Develop and implement a promotion plan that includes program goals and SMART objectives specific to your PD promotion efforts. With these in mind, develop key messages and a call to action that will resonate with your audience.

- Collect feedback data to understand how (or if) your target audience is responding to your messages. This can help you be more effective moving forward.

Now that we've covered the first three PD practices of Sustain, Design, and Promote, let's take a moment to review.

ACTIVITY 3: SUSTAIN, DESIGN, AND PROMOTE PD PRACTICES

Your Training Development Group (TDG) now turns its attention to hammering out the details of the new Professional Development (PD) program for your organization, starting with the Sustain, Design, and Promote practices. As your group gets to work, help them avoid common mistakes and keep in mind key strategies and tips for success.

QUESTIONS

1. Which element is most important for sustaining your PD infrastructure?
   a. An understanding of the PD practices among all of the organization's employees
   b. Alignment with your organization's strategic plan
   c. Allowing as many employees as possible to serve as PD trainers or facilitators for their peers
2. Which of the following should your group make sure it has in place to create a sustainable PD infrastructure?
   a. Distance learning software
   b. Plans for a PD kick-off celebration
   c. Processes to ensure the use of qualified PD providers
3. Which of the following is a common mistake made during the PD design phase?
   a. Having overly specific objectives
   b. Having too many objectives
   c. Having objectives bound by a precise timeframe
4. Which of the following statements reflects a key PD promotion strategy?
   a. Use an audience profile to frame your messages based on your audiences' communication preferences
   b. Develop key messages based on what seems to be working for other organizations in your field
   c. Collect feedback from your organizational leadership on what they think about your promotion messages to employees
5. Which of the following is a strategy your group should use to draw audiences to your PD offerings?
   a. Frequently develop new templates and logos for your PD program to draw your audience's attention.
   b. For consistency, only involve individuals from your own organization's Training Development Group in your PD program
   c. Utilize multiple advertising channels, such as mass emails and newsletters.

ANSWERS

1. Which element is most important for sustaining your PD infrastructure?
   a. Try again! It is not critical for all employees in an organization to understand the PD practices.

b. **Correct! Alignment with your organization's strategic plan is an important element for sustaining your PD infrastructure.**
c. Try again! Only qualified individuals with the appropriate knowledge and skills should be considered to serve as a trainer or facilitator.

2. Which of the following should your group make sure it has in place to create a sustainable PD infrastructure?
   a. Try again! This is not a key strategy for sustaining a PD program.
   b. Try again! This is not a key strategy for sustaining a PD program.
   c. **Correct! It is important to have a process in place that ensures the use of qualified providers in order to create a sustainable PD infrastructure.**

3. Which of the following is a common mistake made during the PD design phase?
   a. Try again! It is beneficial to have SMART objectives, which are specific.
   b. **Correct! Having too many objectives is a common mistake.**
   c. Try again! It is beneficial to have SMART objectives, which are time-based.

4. Which of the following statements reflects a key PD promotion strategy?
   a. **Correct! Using an audience profile to frame your messages will help your promotion efforts.**
   b. Try again! It is more important that your key messages be based on goals and SMART objectives specific to your program.
   c. Try again! It is more important that you collect feedback from the employee target audience directly.

5. Which of the following is a strategy your group should use to draw audiences to your PD offerings?
   a. Try again! A standard template and logo for your PD program will help employees recognize your communications.
   b. Try again! Building partnerships with other organizations that can lend complementary expertise is an effective way to promote your PD offerings.
   c. **Correct! Utilizing multiple advertising channels is an effective strategy for promoting your event and drawing audiences to your PD offerings.**

PD PRACTICE #4: DELIVER

Let's take a look at the fourth PD Practice, **Deliver** Professional Development. This is the execution phase and is your opportunity to impact learning and create change.

As mentioned earlier in the course, your PD offerings can be delivered in a variety of ways, from in-person to online. In this course, we will focus on in-person delivery. You can learn more about online delivery techniques in the next course in this series, *Professional Development 201: From Basic to Dynamic.* Regardless of the format, it is essential to integrate adult learning principles in your delivery.

The delivery for in-person sessions can be the difference between engaging or sleep-inducing events.

Adult learners should be allowed to build upon their own relevant life experiences and knowledge. Drawing out previous experiences can uncover a learner's misperceptions, which can be a significant impediment to new learning.

Creating a safe and supportive environment allows learners to be vulnerable in learning new knowledge or skills. You can support learning and put participants at ease with low-risk activities, presented in a

strategic sequence. For example, go from simple to complex concepts, or do group activities before independent exercises.

It is also important for adults to be able to practice new skills through offerings that foster exploration to enhance learning. This increases the likelihood of behavior change, moving participants from the cognitive skill of understanding information to application of that information.

The second course in this series, *Professional Development 201: From Basic to Dynamic*, takes a closer look at adult learning principles.

Training versus Facilitation

There is a difference between training and facilitation, although the two terms are frequently used interchangeably.

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. Both outcomes and steps to meet the objectives are determined before training begins. An example of training is a course on how to insert formulas into an Excel spreadsheet.

Facilitation, on the other hand, involves moving from the knowns to the unknowns. It 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. Instead, it emerges as the group works on the situation through open discussion in a safe environment where participants can be honest without fear of being bullied or ridiculed. An example of facilitation is a guided group discussion on selecting a software application to create spreadsheets.

A single event may be delivered by more than one trainer or facilitator. In that case, the co-instructors or co-facilitators should learn each other's styles and rehearse beforehand. Specifically, they should:
- Clarify roles and expectations;
- Agree on when and how to give feedback to each other;
- Develop communication signals; and
- Communicate in advance about conflict management.

PD PRACTICE #5: FOLLOW UP

We have now come to the fifth PD Practice: Provide **Follow-Up** Support. It's not over when your participants leave the PD event! This is when you have the opportunity to strengthen their knowledge and skill levels with continued, targeted follow-up support.

Follow-up support should be intentional and systematically planned during the Design phase and should not include any new information.

An effective follow-up support plan helps ensure transfer of learning and includes four components:
1. A summary that includes a brief time line.
2. A detailed description of support activities to be conducted before, during, and after your PD event.

3. An action plan for implementation of new skills that captures next steps and assigns responsibilities.
4. A detailed time line that includes intervals of when support activities will be conducted.

Do you remember the range of options when we discussed the Promote practice? Likewise, there is a range of options for your follow-up support as well, depending on your available resources in cost and time.

Looking at the continuum, you can see a range of options—from low-cost, minimal time investments to costly, time-intensive efforts. Starting on the left, low-cost examples include sending e-mail reminders or motivators to your participants or sending "*Letters to Myself*" that are generated by your participants during your PD event. Moving toward the middle, you can see how time and cost investments increase in examples like moderating an online discussion group or providing a podcast. The examples on the right represent high-cost, time-intensive options, such as on-site coaching, advanced levels of training, or establishing professional learning communities.

Let's go through a hypothetical 14-month plan for follow-up support.
- At two weeks: An initial e-mail encourages participants to begin implementation, provides resources, and lists highlights from the training. Technical assistance is offered at this point.
- At one month: A website provides information and easy access to tools that participants can use to begin implementation.
- At three months: Action plans resent to participants remind them of their intentions and commitment.
- At six months: A post-event evaluation seeks to find trouble spots.
- At seven months: A "booster" event provides additional resources and training on specific trouble spots that participants have identified in post-event evaluations. Booster events do not introduce any new information; they only reinforce content from the initial event.
- At ten months: Another e-mail reinforces content and continues to address the barriers identified at seven months. This is also a good time to reoffer technical assistance and send self-assessment tools that were used during the PD event.
- One year later: Phone interviews with team leads provide an opportunity to share successes and discuss needs.
- At 14 months: Commendation letters allow participants to celebrate if they kept their commitments and accepted your offers for technical assistance.

These intervals may differ, but what is important is to have consistent, continued, and intentional contact during a specified time frame.

Key Strategies

Key strategies for follow-up support in group settings include:
- Plan for follow-up support prior to each event;
- Share expectations prior to and during the event; and
- Provide support at appropriate intervals.

The strategies are similar for technical assistance:
- Plan for follow-up support during the initial provision of technical assistance;

- Schedule follow-up support; and
- Provide intentional follow-up support.

PD PRACTICE #6: EVALUATE

The last PD Practice is **Evaluate** Professional Development Processes. This is the systematic monitoring and evaluating of your professional development offerings by collecting data and using it to improve future efforts.

Evaluation can help you assess how participants use the information from your PD offerings three, six, nine months, or even a year or more after your event. Evaluation is a powerful tool to help you determine if you need to refine your training designs to make your offerings more sustainable.

Starting with a set of clear learning objectives is THE most important element of good evaluation because it is those objectives that are the basis for measuring participant change in behavior. Remember, we said in the Design practice that SMART learning objectives not only set the stage for helping your participants develop, but they provide a basis for determining what to evaluate. Careful wording is important; the data you collect will only be as good as the questions you ask.

The data you collect can be used for future professional development planning and to report indicators of success to your stakeholders.

It is critical to know if your participants are using the new skills and knowledge learned in your professional development offerings. The simplest way to find out is to ask them. In other words, obtain their feedback through data collection and use it to evaluate your offerings.

Evaluation Instruments

There are several data collection methods to measure the success of your PD offerings. First, let's consider pre- and post-questionnaires.

Traditionally, participants complete a pre-questionnaire on a set of items before training and then complete a post-questionnaire on the same set of items using the same rating scale at the end of the training. The underlying idea is that any improvement between the pre- and post-questionnaires represents the effects of the training.

However, research has shown that this method may underestimate the impact of training. Participants frequently overestimate their knowledge or skills on the pre-assessment.

A better method is the "retrospective pre-post method." Participants complete a single questionnaire at the end of the training. They are asked to estimate, retrospectively, their knowledge or skill level before the training and then to assess it now, after the training. This lessens the probability of bias because the participants use the same frame of reference to answer both pre-and post-questions.

Another method to collect data is an evaluation form. The most effective evaluation forms include options for both quantitative and qualitative responses; that is, developing both direct and open-ended questions.

Be sure to check out *Professional Development 201: From Basic to Dynamic*, where you can learn more about best practices for retrospective pre- and post-questionnaires and evaluation forms.

Key Strategies

Key strategies to implement during the Evaluation phase include:
- Develop a plan to measure your stated objectives;
- Collect data on processes and outcomes; and
- Identify or create instruments to collect evaluation data.

As we wrap up our discussion of the six PD Practices, let's review the Deliver, Follow Up, and Evaluate practices.

ACTIVITY 4: DELIVER, FOLLOW UP, AND EVALUATE PD PRACTICES

As your Training Development Group (TDG) continues to hammer out the details of the new Professional Development (PD) program, it's time to shift the focus to the Deliver, Follow Up, and Evaluate PD practices. Continue to help your group avoid common mistakes and remind them of key strategies for success.

QUESTIONS

1. Delivery of Professional Development should:
   a. Allow learners to practice new skills to increase their likelihood of behavior change
   b. Start with complex concepts to engage learners immediately
   c. Avoid incorporating learners' previous experiences and knowledge because it might include misperceptions
2. Facilitation:
   a. Focuses on a specific set of skills or knowledge that can be applied in the workplace
   b. Involves moving from unknowns to knowns to meet objectives that were established beforehand
   c. Starts with information about a problem and works toward an outcome that is not set when the process
3. Quality follow-up support for PD requires:
   a. A budget that can accommodate technology and travel costs
   b. Personnel resources to provide continued coaching and mentoring
   c. Thoughtful planning during the design phase to allocate available resources effectively
4. Which of the following statements about providing follow-up support is true?
   a. Follow-up support should be on an 'as needed' or 'on call' basis.
   b. Intentional follow-up support should be provided at appropriate intervals after the PD event.
   c. Follow-up support should be planned with participants during the training event.
5. Which of the following should be the primary basis of a PD evaluation plan?
   a. An understanding of audience members' preferred method of providing feedback
   b. An evaluation form template
   c. A clear set of learning objectives
6. Evaluation can help you assess how participants use the information from your PD offerings…
   a. Only immediately after the event is over

b. Both in the short and long term
c. Only once enough time has passed to be sure there are lasting impacts

ANSWERS

1. Delivery of Professional Development should:
   a. Correct! It is important to incorporate opportunities to practice new skills.
   b. Try again! It is better to put participants at ease by moving from simple to more complex concepts sequentially.
   c. Try again! It is not a good practice to shut down learners' previous experiences because allowing them to share sometimes uncovers misperceptions, which can be a significant impediment to new learning.
2. Facilitation:
   a. Try again! This describes training.
   b. Try again! This describes training.
   c. Correct! This accurately describes facilitation, which starts with information about a problem and works towards an outcome.
3. Quality follow-up support for PD requires:
   a. Try again! The follow-up support continuum gives examples of low-cost methods that may not require expensive technology or travel.
   b. Try again! The follow-up support continuum gives examples that do not require significant personnel resources.
   c. Correct! The follow-up support continuum provides examples to help you effectively allocate resources during the design phase.
4. Which of the following statements about providing follow-up support is true?
   a. Try again! Follow-up support should be planned and scheduled ahead of time.
   b. Correct! It is important to develop a follow-up support timeline that includes providing support at appropriate intervals.
   c. Try again! Follow-up support should be planned before the training event, during the design phase.
5. Which of the following should be the primary basis of a PD evaluation plan?
   a. Try again! While this may be helpful to have, it is not the primary basis of a good evaluation plan.
   b. Try again! While this may be helpful to use, it is not the primary basis of a good evaluation plan.
   c. Correct! Without clear learning objectives, it is difficult to evaluate learning.
6. Evaluation can help you assess how participants use the information from your PD offerings…
   a. Try again! Evaluation can help assess how participants use information in the long term.
   b. Correct! Evaluation can assess how information is used in both the short and long term.
   c. Try again! Evaluation can help assess how participants use information immediately after training.

CHAPTER 4 – CONCLUSION

SUMMARY AND WRAP-UP

Thank you for participating in *Professional Development 101: The Basics*.

Our discussion about Professional Development basics began by introducing you to the six PD Practices. We explored how **sustaining** a PD infrastructure builds capacity and how PD Practices allow you to **design** instructionally sound offerings under optimal conditions. We also discussed how to **promote** your PD offerings. We presented some **delivery** tips to make your offerings streamlined, responsive, and timely, and the importance of **follow-up** efforts and **evaluation** to allow for continuous improvement.

Throughout this course, we have mentioned the next course in the series, *Professional Development 201: From Basic to Dynamic.* Please be sure to complete that course to learn more about adult learning principles, techniques for developing webinars from pre-production to post-production, and facilitation tips for online delivery.

Let's end with one final activity that you can use to help you determine your readiness to start using the PD Practices we've discussed today.

Also, be sure to download and print a Certificate of Completion after completing the entire course.

ACTIVITY 5: MY PROFRESSIONAL DEVELOPMENT PRACTICES READINESS

Strategy	By When
Name one **SUSTAIN** strategy that you plan to address.	
Name one **DESIGN** strategy that you plan to address.	
Name one **PROMOTE** strategy that you plan to address.	
Name one **DELIVER** strategy that you plan to address.	
Name one **FOLLOW-UP SUPPORT** strategy that you plan to address.	
Name one **EVALUATE** strategy that you plan to address.	

Readiness Ruler

Which number on the Readiness Ruler do you feel indicates your readiness to implement one or more strategies for the Professional Development practices discussed in this course?