



PLANNING ENGAGING LEARNING EXPERIENCES

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PLANNING ENGAGING LEARNING EXPERIENCES: AT A GLANCE

This resource provides recommendations for methods, tools, suggested (not endorsed) sample solutions, and tasks trainers can use to increase participant engagement in professional learning experiences. It also outlines connections between adult learning principles and steps in the [Adult Learning Framework](#).

COMPETENCY PHASES	AWARENESS	Attends to fact-based information and attitudes; goals/tasks align with Bloom’s Taxonomy levels 1 and 2, remembering and understanding, or Webb’s Depth of Knowledge level 1, recall.	On-demand podcasts, shared reading	SAMPLE TRAINING METHODS
	CAPACITY BUILDING	Attends to knowledge, skill, and attitude application; goals/tasks align with Bloom’s levels 3 and 4, applying and analyzing, or Webb’s levels 2 and 3, skills/concepts and strategic thinking.	Facilitated lesson planning sessions, observe expert-student interactions	
	IMPLEMENTATION	Supports plan implementation and monitoring. Goals/tasks align with Bloom’s levels 4, 5, and 6, analyzing, evaluating, and creating or Webb’s levels 3 and 4, strategic thinking and extended thinking.	Monthly community of practice, observation by instructional specialist	
MEASUREMENT TYPES	NEEDS ASSESSMENT	Determines types of and audiences for professional learning experiences; used to improve current performance or correct an individual or group deficiency.	Focus groups, interviews, questionnaires and surveys, scans	SAMPLE TOOLS
	PREASSESSMENT	Determines prior knowledge, skills, and attitudes; focuses on learning targets; identifies gaps in prerequisite knowledge and skill; provides a baseline for monitoring progress; and checks for misconceptions.	Connection tasks , multiple-choice items	
	FORMATIVE ASSESSMENT	Allows trainers to offer regular feedback to learners about their learning progress; helps identify corrective actions to take.	Consolidation tasks , observation, quizzes and polls	
	SUMMATIVE ASSESSMENT	Used to determine the value and efficacy of a professional learning event; helps with future decisions about planning and implementation of learning events.	Case study analysis, group work, observation, portfolio	
VIRTUAL ENGAGEMENT SOLUTIONS	COLLABORATIVE DESIGN	Learners generate ideas; collect information (written, visual, etc.); and brainstorm using structured methods.	Jamboard , Miro , Padlet , shared slides	SAMPLE SOLUTIONS
	PROJECT-BASED LEARNING	Learners contribute to and co-author tasks, written work, multimedia presentations, etc.	Shared document and slides	
	MIND AND CONCEPT MAPPING	Learners consolidate information visually, create visual frames of knowledge, and represent simple and complex processes.	Jamboard , Miro , Padlet , Popplet	
	LISTING, RESPONDING, AND DISCUSSING	Trainers capture participants’ responses to prompts and to other learners’ ideas in writing or orally.	Chat box, Mentimeter , Nearpod , Padlet , shared document, Slack	
	POLLING, VOTING, AND SURVEYS	Learners participate in whole-group responses, indicate their levels of understanding to trainer prompts, rank ideas, etc., in efficient ways.	Mentimeter , Nearpod , polls, survey apps/forms	
	SOCIAL NETWORKING	Learners connect with one another directly to process ideas together verbally.	Breakout rooms, Kumospace	
	SHARED READING	Learners actively read, annotate, comment, and highlight texts.	NowComment , shared documents	
	ASSESSMENT	Trainers check for understanding throughout learning experiences.	Google forms, Nearpod , Quizziz	

ADULT LEARNING PRINCIPLES	1. ADULTS ARE SELF-DIRECTED AND PREFER AGENCY IN THEIR LEARNING							
	Relevant Step(s)	1a	1b	2a	2b	2c	3a	3b
		3c	3d	3e	3f	3g	4a	
	Strategy or Resource	Connection tasks Consolidation tasks Transfer tasks						
	2. ADULTS COME TO LEARNING SITUATIONS WITH SUBSTANTIAL EXPERIENCE							
	Relevant Step(s)	1a	1b	2a	2b	2c	3a	3b
		3c	3d	3e	3f	3g	4a	
	Strategy or Resource	Connection tasks Active Learning tasks Consolidation tasks Transfer tasks						
	3. ADULTS ARE MORE OPEN TO LEARNING WHEN THEY FEEL RESPECTED AND SAFE							
	Relevant Step(s)	1a	1b	2a	2b	2c	3a	3b
	3c	3d	3e	3f	3g	4a		
Strategy or Resource	Connection tasks							
4. ADULT LEARNERS SEEK RELEVANCE AND USEFULNESS								
Relevant Step(s)	1a	1b	2a	2b	2c	3a	3b	
	3c	3d	3e	3f	3g	4a		
Strategy or Resource	Connection tasks Consolidation tasks Transfer tasks							
5. ADULT LEARNERS NEED TO PRACTICE								
Relevant Step(s)	1a	1b	2a	2b	2c	3a	3b	
	3c	3d	3e	3f	3g	4a		
Strategy or Resource	Active Learning tasks							

STEP 1: Identify the rationale for professional learning

- 1a: Indicate how the learning need was identified.
- 1b: Define the desired outcomes of professional learning.

STEP 2: Identify knowledge and skills that drive the outcome

- 2a: Identify the knowledge and skills that have a high likelihood of driving the desired outcome.
- 2b: To achieve the desired outcome, match knowledge and skills with the individuals who need them.
- 2c: Situate skills and knowledge within a progression of learning experiences.

STEP 3: Design and implement learning experiences to develop skills and knowledge

- 3a: Determine audience size and learner characteristics.
- 3b: Identify the learning goals and measurements of learning.
- 3c: Establish relevance and benefit.
- 3d: Determine a training method.
- 3e: Identify an appropriate delivery model.
- 3f: Structure the learning process.
- 3g: Design high-quality learning materials.

STEP 4: Assess the effectiveness of learning experiences

- 4a: Select the appropriate survey.

CONNECTION TASKS immerse learners in meaningful, topic-related activities that establish important connections between the learner and topic.

- » Connecting Learners to the Learning Outcomes
- » Connecting Learners to One Another and to the Topic
- » Connecting Learners to the Trainer
- » Connections to Prior Knowledge
- » Personal Goal Setting

ACTIVE LEARNING TASKS engage learners with content in active ways that facilitate the internalization of knowledge, skills, and attitudes.

- » Explicit learning: Includes modeling, demonstration, visual and process models, and think alouds
- » Engagement and sensemaking: Includes Kagan learning structures, School Reform Initiative protocols, and Harvard Thinking Routines; case studies, role plays, simulations, and debates; direct practice with content, materials, techniques, and technologies; and design work
- » Feedback

CONSOLIDATION TASKS promote self-direction and agency in learners; clarify the relevance and usefulness of new knowledge, skills, and beliefs; and prompt learners to engage in sensemaking in focused ways that take into account personal and professional experience.

- » Debrief Protocols
- » Graphic Organizers and Concept Maps
- » Illustration Tasks
- » Mnemonics, Analogies, and Synectics
- » Restatement Tasks
- » Summarizing Tasks

TRANSFER TASKS are designed to enhance the likelihood that learners will bring new knowledge, skills, and beliefs into their daily contexts.

- » Action Planning Tasks
- » Anticipation Tasks
- » Assets and Barriers Tasks
- » Value Statement Tasks

Sample Connection Tasks

CONNECTION TASKS immerse learners in meaningful, topic-related activities that establish important connections between the learner and the topic. Such tasks increase **self-direction** and **agency** and prompts the learner to consider the **relevance** and **usefulness** of new learning in advance.

CONNECTING LEARNERS TO THE LEARNING OUTCOMES –

Give learners the opportunity to talk about and connect their personal goals with the learning outcomes.

Sample Task: Sentence Stems

1. Preview the learning outcomes, then present participants with this stem: “I want to (-) so I can (-).”
2. Ask them to focus in on something specific they want to learn (based on the learning outcomes) and for what purpose.
3. Prompt them to generate a written statement.
4. Explain to them that setting an intention can be a powerful motivator for learning and can help them focus in on what is particularly relevant to them.
5. Prompt participants to share their statement to the whole group or an individual.

VARIATION: Situate participants’ statements in a Know-Want to Know-Learned (K-W-L) chart and revisit the chart at the end of the event to monitor learning.

CONNECTING LEARNERS TO ONE ANOTHER AND TO THE TOPIC –

Builds a sense of community, enhances personal feelings of belonging and safety, and clarifies why the learning is relevant and useful to the participants.

Sample Task: Four Corners¹

1. Before the activity, mark four to five areas in the learning space with a large image, number, or word that corresponds to the choices you will be giving.
2. Ask participants to silently reflect on a statement or question prompt that is aligned to the content of the learning event.
3. Share response choices with the group on a poster/slide.

4. Instruct participants to choose a response, move to that designated “corner” of the room, find a partner or trio within the group that forms in that area, and share what drew them to that choice. Monitor to ensure each participant has someone to share their response with.
5. Invite participants to share their choice and rationale with the whole group.

VARIATION: This task can be used to consolidate learning at the end of an event.

CONNECTING LEARNERS TO THE TRAINER – Can help to strengthen the trainer’s relevance and usefulness as a learning facilitator and presents an opportunity to further create a respectful and safe learning space.

Sample Task: Would You Rather?

1. Prepare several “Would you rather?” questions for the event. These choice-based questions can be humorous and personal, or they can reflect preferences related to the content you will explore together.
2. “Draw” or delineate a line in the training space and invite participants to stand for this activity.
3. Pose several “Would you rather?” questions and ask participants to “vote with their feet” by standing on one side of the line or the other (orient them to where they should stand based on their preference).
4. Participate along with the group so they can see what your preferences are.
5. Read the dynamics of the groups to see if participants need time to process their choices before you read out another choice.

¹ Adapted from *SEL 3 Signature Practices Playbook*. (2019). CASEL. Retrieved July 13, 2021 from https://schoolguide.casel.org/uploads/2018/12/CASEL_SEL-3-Signature-Practices-Playbook-V3.pdf

CONNECTIONS TO PRIOR KNOWLEDGE – Give learners the opportunity to review, discuss, or write about what they already know or think they know about the topic.

Sample Task: Hot Potato

1. Assemble groups of three or four learners.
2. Give each learner a sheet of paper with a different topic or question written at the top of the page.
3. Give groups a short length of time to brainstorm and write down all the key points they can think of that are related to the topic/question before passing their paper on to the next person in their group.
4. Each time they receive a paper, learners read what is already written and add their statements. Specify that key points should not be repeated, although clarifying words can be added.
5. Each learner’s paper should be passed along until it arrives back at its original owner.

PERSONAL GOAL SETTING – Bring to a conscious level participants’ personal reasons for being in attendance, in turn enhancing their sense of self-direction and agency.

Sample Task: 3 And 5 List

1. Prompt participants to list three things they already do well or know about the topic/skill they are learning about.
2. Ask them to then list five things they want to learn about the topic or need to learn to be able to do.

VARIATION: Pair with a needs assessment to preview content and skills to be learned, and to inform the 3 and 5 list.

Sample Consolidation Tasks

CONSOLIDATION TASKS promote **self-direction** and **agency** in learners; clarify the **relevance** and **usefulness** of new knowledge, skills, and beliefs; and prompt learners to engage in sense-making in focused ways that take into account personal and professional **experience**.

DEBRIEF PROTOCOLS – Assist participants to collectively consolidate focused aspects of what they learned.

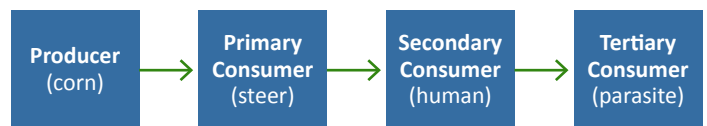
Sample Task: 3-2-1 Plus 1²

1. Assemble groups of three or four learners.
2. Participants draw a right-hand margin on a piece of paper and label the margin “Plus 1.”
3. Individuals write three key ideas they remember from the learning event, two things they want to explore, and one point to ponder.
4. Round-robin share one idea each. As members share, listeners may record personal notes in the right-hand margin.
5. Continue the pattern through the next two categories.

GRAPHIC ORGANIZERS AND CONCEPT MAPS – Prompt participants to generate connections between new information presented in a learning event, to better understand and visualize how various ideas work together, to establish consistent language across an initiative, or to demonstrate a decisionmaking or planning process.

Sample Task: Process Map³

For any given concept, ask participants to chart features (write inside of a square or circle shape) and the relationships between the features (use labeled lines and/or directional arrows).



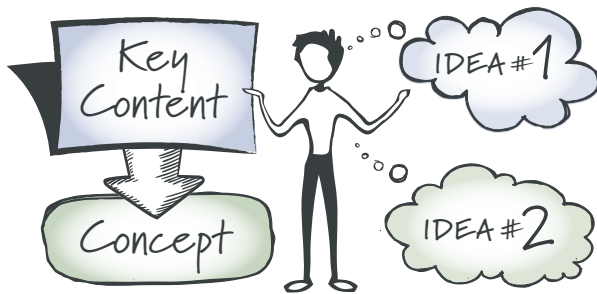
² Adapted from *Adaptive Schools*. (No date). Retrieved July 2, 2021 from <https://www.livebinders.com/play/play?id=1626114>

³ Adapted from *What Is a Concept Map*. (No date). Retrieved July 13, 2021 from <https://www.lucidchart.com/pages/concept-map>

ILLUSTRATION TASKS – Use to consolidate relationships between complex ideas.

Sample Task: Sketch Notes

1. In groups of two to three, prompt participants to summarize a big idea using illustrations. Provide them with paper/flipchart page and markers.
2. Provide participants with a “bank” of illustrated bullets, frames, figures, and connector shapes, as well as a model of a different big idea.
3. Post pictures around the training space and invite participants to conduct a gallery walk. Prompt them to affix notes to each illustration to extend on the idea, add a question, or offer praise.



MNEMONICS, ANALOGIES, AND SYNECTICS – Use these memory techniques to allow participants to link new information and ideas to familiar understandings in unique linguistic ways that help to encode important information.

Sample Task: Mnemonic

Invite participants to use a letter strategy to generate important aspects of a concept. They may choose to use an acronym (such as ROYGBIV to recall the colors of the rainbow) or an acrostic (such as HOMES to remember the names of the Great Lakes).

VARIATION: Provide participants with an acrostic and prompt them to write full sentences that include the vertically stacked word.

RESTATEMENT TASKS – Taps into participants’ active-listening skills and allows them to pause, recall, and clarify the essence of something before moving ahead.

Sample Task: Matchbook Definitions⁴

1. Prompt groups to craft a “matchbook” definition of an important idea or disposition addressed in a learning event.
2. Explain that like a matchbook, very few words can be used (8–12) because there isn’t enough space.
3. Give groups (of 2 to 4) 5 minutes to craft and post the definition.

VARIATION: Use this strategy to check understanding by summarizing conclusions from a discussion or dialogue.

TIPS

- » Keep definitions posted for reference.
- » Use half sheets of chart paper or small digital spaces to encourage short definitions.

SUMMARIZING TASKS – Prompt participants to generate oral and written accounts of new skills and/or the relationship between new knowledge and ideas.

Sample Task: Content Check Information⁵

1. Randomly distribute cards numbered 1 through 4.
2. Display a chart with the following ideas:
 - » What are we supposed to do?
 - » Why are we doing it?
 - » What are we expecting to see?
 - » What are our next steps?
3. The numbers that members receive determine which learning event summary statement they make.

VARIATIONS

- » Throw numbered cards on a table, and participants identify questions.
- » Add summary checks for groups with 4+ people (e.g., Who needs to know what happened? By when are next steps due?).

⁴ Adapted from *Adaptive Schools*. (No date). Retrieved July 2, 2021 from <https://www.livebinders.com/play/play?id=1626114>

⁵ Ibid.

Sample Transfer Tasks

TRANSFER TASKS are designed to enhance the likelihood that learners will bring new knowledge, skills, and beliefs into their daily contexts. These tasks harness learners’ sense of **self-direction** and **agency**, consider learners’ contextual **experiences**, and clarify the **relevance** and **usefulness** of what has just been learned.

ACTION PLANNING TASKS – Clarify needed action(s) after a learning event and can increase the likelihood of follow-up and accountability.

Sample Task: Traffic Light⁶

After learning something new, participants reflect on what they are going to stop doing (red), continue doing (yellow), and start doing (green).

ANTICIPATION TASKS – Tap into self-efficacy and optimistic thinking by focusing on possibility and emphasizing personalization of new learning.

Sample Task: Adaptations and Possibilities

1. Ask learners to consider the following questions:
 - » If this information is or these skills are to be applied, what adaptations will I have to make?
 - » If I were to combine this with existing knowledge or systems in my world, what might this create?
2. Learners may verbally process their thinking with a partner, or the task can be adapted so that learners place a sticky note on an “adaptation” poster and another on a “possibilities” poster. Depending on the number in the learning event, several such posters can be placed around the room and learners can read through sticky notes for greater insights and inspiration.

ASSETS AND BARRIERS TASKS – Prompt learners to proactively consider factors that will help or hinder their ability to enact new skills, understandings, and attitudes.

Sample Task: Contingency Planning⁷

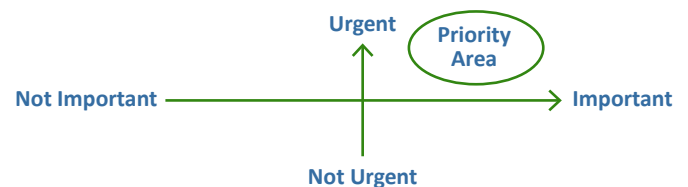
1. Ask participants to identify one new skill or attitude or new knowledge they would like to apply right away.
2. Ask participants to brainstorm possible resistance or barriers to integrating that new skill; knowledge; or attitude into their workplace (e.g., who, what, where, when, how).

3. After participants brainstormed, prompt them to consider which barriers they have some level of control over and to cross out factors they have no control over.
4. Ask participants to identify factors that could facilitate adherence to newly learned skills, knowledge, and/or attitudes. Again, they may wish to consider helping factors in terms of who, what, where, when, and how.
5. Finally, prompt participants to match one barrier with a strategy they can use when they bump up against that barrier.

VALUE STATEMENT TASKS – Prompt learners to actively consider and sometimes prioritize relevant material they will take away from the learning event.

Sample Task: Urgent/Important Grid⁸

1. Hand out a copy of the grid below to individuals or teams, along with small cards that articulate key aspects of the new learning.
2. Invite participants to sort through what new information, skills, or dispositions are most important for them to attend to right away. Where they place cards on the grid will indicate where they need to put the most effort moving forward with the new learning.
3. Ask participants to rank ideas on the cards in terms of what is most urgent and important to attend to, what is least urgent and important, etc., by placing cards on the grid to represent where they fall. Cards that are least urgent/important may represent knowledge and skills they already have, for example, or skills they need to apply further down the road.
4. Debrief by pairing participants and setting a timer for 1 or 2 minutes for each person to share their thinking with a partner.



⁶ From Lipton, L., and Wellman, B.M. (2011). *Groups at Work: Strategies and Structures for Professional Learning*. Charlotte, VT: Miravia.

⁷ Adapted from Will Thalheimer. (No date). *Triggered Action Planning—Job Aid*. Retrieved July 2, 2021 from <https://www.worklearning.com/wp-content/uploads/2014/09/Triggered-Action-Planning-Job-Aid-v1.2.pdf>

⁸ Adapted from *Facilitation Tools for Meetings and Workshops*. (No date). Retrieved July 2, 2021 from <https://www.livebinders.com/play/play?id=1626114>