

Step-by-Step Guide: Session Planning and Design



This form can be used to direct and guide conversations with subject matter experts who would like guidance on how to plan, design, and develop a session that meets the learning needs of the audience.

Topic Selection

Topics should reflect the needs and interests of the target audience.

What topics are of greatest interest to your audience and will also help them succeed in their current role?

[Click here to enter text.](#)

Describe the Audience

Identifying the target audience is important because it helps you consider the topic from *the audience's* perspective.

Who are they?

[Click here to enter text.](#)

What is their level of experience with the topic?

[Click here to enter text.](#)

What are their concerns and challenges as they relate to the topic?

[Click here to enter text.](#)

Determine Session Goal and Learning Objectives

Session Goal

The session goal describes what participants will gain from the session. Think about whether you want participants to change their attitude, develop new skills, and/or obtain new knowledge.

- **What will the participants learn?** (Example: the tools and skills necessary to actively plan their professional development)
[Click here to enter text.](#)
- **Why it is important for them to know or acquire this skill?** (Example: to advocate for their career)
[Click here to enter text.](#)

Combine your answers into a single statement—this is your session goal. (Example: To provide participants with the tools and skills necessary to actively plan their professional development and advocate for their career)

Goal Statement: [Click here to enter text.](#)

Learning Objectives

*Ask yourself: To accomplish the stated goal, what will participants **need to know** or be **able to do**?*

At the completion of this session, participants should be able to: (Example: Perform a self-assessment of their current role and responsibilities using the provided tool)

1. [Click here to enter text.](#)
2. [Click here to enter text.](#)
3. [Click here to enter text.](#)

Create Session Outline

Learning Chunks and Session Flow

Once you've developed your goal(s) and learning objectives, you can focus on the content.

Ask yourself the following questions:

- *What are the major topics and/or learning points to be made that support the learning objectives?*
- *What is the appropriate sequence for the topics?*
- *How will you involve and engage participants to apply what they are learning?*
- *How much time will be needed to address each topic?*

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Learning Objective	Speaker	Learning Format (See examples below)	Instructional Activities (See examples below)	Materials (See examples below)	Duration (in minutes)



The magic number of retainable topics is somewhere between three and five. A concise presentation allows the learner to focus on the key elements.

Learner Engagement

Here are examples of [learning formats](#), instructional activities and materials, to help participants reflect, integrate, or apply what they are learning.

Activities	Materials (for use during or after the session)
Icebreaker	Visuals (for example, graphs, charts, photos)
Problem-Solving Exercises	PowerPoint Slides
Pair-Share or Small Group Discussion	Reflection Book/Questions
Role-Play	Assessment
Case-Study	Handouts (for example, PowerPoint slides, Checklists, Quick Reference Guides)
Reflection (individual and organizational)	
Brainstorming	
Assessment or Quiz	
Simulation	
Direct questions to the audience	

Learning Formats

Learning Format	Description	Considerations
Expert Lecture	An expert speaker conveys information to a large group.	Familiar and comfortable to many participants. A well-designed lecture can be effective, but if used too often or for too long, participants will lose interest and won't learn as much. Most effective lectures incorporate audience interaction in some form—e.g., soliciting audience responses or asking audience members to discuss ideas in pairs.
Panel Discussion	A small group of experts, led by a moderator, discusses an issue from a variety of perspectives.	Important to select a skilled moderator or facilitator with prepared questions. Lends itself to better conversations than a lecture because it provides more varied opinions. Again, should not be used too often or for too long and audience interaction should be encouraged.
Debate	Two or three debaters holding clearly differing points of view exchange insights on a topic of import to the audience.	Important to select a skilled moderator or facilitator with prepared questions. Abstracts should be made available to participants and should: identify the topic, why the topic is of interest, and the contrasting positions of the debaters.
Workshop or Breakout Session	Led by a moderator, it usually allows for more interaction.	Important to select a skilled moderator or facilitator. Engaging activities should be included.
Think Tank or Buzz Group	A facilitator will frame a key issue or question. Participants break into small groups to discuss it. A facilitated large-group discussion follows. The small groups share what they identified/explored.	Important to have a clear assignment and defined expectations for output. One member of the group should serve as recorder.
Fishbowls	A number of participants form an inner circle to debate an issue. Others sit outside the circle to listen and observe.	The outside group gives feedback to the fishbowl group after it finishes debating and discussing.

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Case Studies	Reports of real-life events and problems. Audience discussion is the main learning method.	Important to select a skilled moderator or facilitator. Discussions should be primarily audience driven.
Peer-to-Peer Round Table Discussion	A structured system to provide peer engagement around specific topics. Each table has an established topic and facilitator. The facilitator frames the discussion and encourages participation from each person at the table.	Important to select a skilled facilitator. Most successful when topics are identified by participants and not the session organizers.
Paper	Lecture-style presentation(s) made by one or more speakers to share research results, completed work, and innovative concepts, methodologies, or tools.	Each presentation should be no longer than 20 minutes with additional time allotted for questions. A full paper or a synopsis should be available for distribution or download during the session. Time keeping is important for this type of session.
Birds of a Feather or Idea Exchanges	A relatively small and informal topic-based discussion with NO formal presentation. Networking, idea exploration, and information sharing are the main goals.	The facilitator ensures introductions and kicks off the session with a question or idea for the group to discuss.
Lightning talk or Ignite	A very short presentation, usually between five and ten minutes in length. The short format forces the speaker to only include critical information. Several lightning talks will usually be delivered by different speakers in a single session.	Slides may be required or not permitted depending on the organization of the session. For sessions requiring slides, a fixed number may be set. Time keeping is important for this type of session.

Adapted from *The Association Educator's Toolkit*. Washington, DC: American Society of Association Executives; 1995.

Additional Sources:

CES SCÉ Types of Presentations. <http://c2016.evaluationcanada.ca/types-of-presentations/index.html>

American Evaluation Association Conference Session Types. <http://www.eval.org/p/cm/ld/fid=170>