

Building a Lesson Plan

An easy-to-follow primer on one of training's most basic tools.

By DAVID R. TORRENCE

Teaching can be defined as the management of learning. Anyone who has been a manager realizes that managers need a strategy or direction. If managers have no plan, they can only react to issues as they arise. The problem is that they usually have no control over the big picture.

Likewise when instructors walk into a training session with nothing more than their expertise, they are practicing crisis management. Most often they will be forced to react to issues as they arise and will have no certainty as to where they will take them. Just knowing the material is not enough.

Experience helps, to be sure, but planning is essential unless, of course, a trainer is using "instructor-proof" material: lessons designed so that anyone can follow the script and teach. Expensive to design, these lessons are questionable in their effectiveness. They certainly ignore the benefit of an instructor's experiences in the subject area and the value of the instructor-trainee dialogue.

When you were a student you may have thought your favorite teachers just walked into the classroom and spontaneously conducted a lesson. Some probably did, but

most of your teachers used a plan, whether you were aware of it or not. In education and training, the instructional management plan is called a lesson plan.

A lesson plan is both a strategy and a ready reference. It is a strategy in that it is a sequential set of events that leads to a desired goal. It is a ready reference in that it is a checklist of the necessary information to effect the set of events. A lesson plan, then, summarizes who will conduct the instruction to whom the instruction is directed and what, where, when, why, and how instruction will take place.

Lesson plans come in several formats, varying from textbook to textbook. Figure 1 shows the format used here to discuss the essential elements. This format involves a mental exercise that causes the instructor to develop his or her management scheme to avoid those unnecessary "boy, I wish I had . . ." situations. Keep in mind, though, that the lesson plan is not a form to be filled out and filed. Rather it is a format to be developed and used.

When

The elements of time and date are included for more than administrative purposes. They force you to think about each element as a part of the total course.

A listing of the time and date states more than the regularly scheduled time period. You should think of it as the time "package" in which you structure planned learning activities inclusive of any administrative requirements, class breaks,

tests, and quizzes. Once you analyze this listing with respect to the completed plan, you can then place selected teaching strategies in a time context.

Without a lesson plan, each lesson is a guess as to the value of the time that should be devoted to it. Think about your own school experience. How many history courses ended before they brought you up to date? A good time analysis would have helped.

Your "class"

Class should be more than a description of the group or a sum of parts. Think of it, rather, as a collection of individual trainees. The more individual difference you can identify, the more effective you will be in meeting your trainees' needs. Individual differences might include prerequisite weaknesses, physical problems such as visual or hearing disabilities, differences in work experiences, social and cultural differences, or personal motivation.

All of these will affect your choice of activities and the time or pacing of your presentation. This element forces you to define what constitutes your class.

Materials

The materials element is a checklist of the paraphernalia required to conduct the lesson. Obviously you may assume some things, so it is not necessary to list everything. You may assume that materials such as desks, tables, and lights are available unless they are specialized or you know they are not available. For example

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if you are going to use an overhead projector, you may be relatively sure that you will have a 110- to 120-volt AC outlet—it would be difficult to find a building in the United States that didn't. But if you plan to use an overhead, nothing else should be assumed.

Your material checklist should include any transparencies, projector, and projection screen or white board you may need. You may want to include an extension cord. How about a three-pin adapter and an extra projection bulb? The success of the training session can hinge on any one of these required items. You should identify and list anything you need to ensure its availability for the training session.

Objectives

Instructional objectives constitute the most important element of your lesson plan. You should state these objectives in performance or behavioral terms; this is your statement of what the trainees will be able to do as a direct result of your training—or as a result of your management of learning.

Because your objectives are performance statements of your goal, you should subordinate all other elements to these objectives. The objectives set the time and dictate the activities of the lesson. An instructor who is not familiar with performance objectives should be trained in their use.

The importance of these objectives cannot be stressed too much. If any legal liability accrues to your training through contract or errors and omissions clauses, you definitely should draft valid and measurable objectives.

Transition

An obvious element of some formats but implicit in others is the transition. This is either a statement or an activity that connects or articulates the previous lessons with the current one. It can be a simple "If you recall . . ." statement, a quiz, or a trainee presentation on some aspect of previous learning. The transition provides a sense of continuity and continuation; it not only acts as an introduction but summarizes the previous material for recall and for use with the new material.

Motivation

After trainees are oriented from where they "are" to where they "are going," the next element you need in order to focus attention and encourage interest is the motivation or springboard. This can be a statement or an activity such as a relevant

Figure 1—Sample lesson plan

Time:	_____
Date:	_____
Class:	_____
Materials:	_____
Objectives:	_____
Transition:	_____
Motivation:	_____
Activities:	_____
Summary:	_____
Homework:	_____
Notes:	_____

story, verbal or printed; a meaningful joke or cartoon; a hypothetical situation to structure the unknown, such as a problem in which the solution can be achieved only as a result of the pending lesson; or a drama or media presentation.

You should involve a minimal amount of time in this element. Because your motivation is to encourage learning, the time and effort you devote to this element should not interfere with the training.

Activities

Once you have identified the material you'll be covering and the trainees are oriented and motivated to learn, the next element you need to address is the activities required to teach the material. The activities statement describes what you will do to affect the instruction.

There appears to be an infinite variety of strategies to affect the instructional objectives, but you should make a systematic strategy selection. The first step requires

you to examine the objectives and determine the appropriate domain—cognitive, affective, or psychomotor.

The cognitive domain deals with the facts and information trainees know, can recall, or comprehend. If the objective requires them to remember or use facts or ideas, then the objective is in the cognitive domain.

The affective domain concerns trainee feelings. If the objective is for them to show increased interest or motivation in a subject or some activity, or if some change in attitude or values is desired, then the objective is in the affective domain.

The psychomotor domain concerns how trainees perform an activity or control their bodies. If the objective requires them to manipulate an object, to use some tool to produce a product, or to perform a routine requiring them to move parts of their body in specified ways, then the objective is in the psychomotor domain.

Once you identify the domain you can

select an appropriate instructional strategy, with specific strategies generated for each domain. Psychologists and learning theorists have organized learning tasks into domains, levels, and conditions and have devised schemes to successfully match a learning task to an instructional method.

One systematic scheme that was developed for a project sponsored by the U.S. Office of Education identifies specific instructional strategies for objectives in the various domains, each appropriate for a different type of objective. For instance one of the strategies in the cognitive domain is the "rule using" strategy. Rule using is required whenever a trainee is asked to solve a problem taking two or more steps to arrive at the solution—that is, to solve a problem or produce a creative product.

Your next step is to write a strategy prescription. Each of the instructional strategies consists of three phases: presentation, practice, and evaluation. A strategy prescription involves making specific decisions as to the type of procedure appropriate for a given strategy and specific content for each phase. When planning a specific training strategy, it is usually desirable to plan the evaluation prior to determining practice and presentation procedures.

In planning trainee evaluation, you must select the activities that will most effectively and efficiently give evidence that the trainees can perform the behavior under certain conditions and to some specified degree of acceptance as specified in the objectives. Those conditions should match the real workplace conditions. If a trainee's job task is to attach widgets together, then to be denied a raise or a new position because his training and subsequent performance testing involved his or her identifying the parts of a widget or knowing the name of its inventor is not legally defensible.

You should develop trainee practice opportunities with objectives in mind. And you must motivate their desire to continue practicing until they reach the stated criterion.

In presenting the required learning material, you are concerned with selecting the activities that will help the trainees achieve the training objective using the instructional strategy selected. This includes giving them subject-related information and information concerning what is expected of them, how they will be evaluated, and the learning activities available that will enable them to get from where they are to where they should be at

the conclusion of the training period.

The activities should include both trainer presentation strategies such as lecture or guided discussion and the instructional media. The trainees' ability to learn from each activity varies. This is where your analysis of the class and time affects activity selection.

One of the general models for activity selection was suggested by Dr. Edgar Dale with his "cone of learning." He describes

a continuum of instructional strategies from concrete to abstract. *Doing* something is a concrete activity while *being told about* something is an abstract activity. Instructor communication, audio-visual presentations, and a combination of both vary in their degree of concreteness to abstractness. Your choice should be the most concrete of the practicable, available activities. Through experience, instructors can better estimate the time required for



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each learning activity.

As part of the activities, you should draft specific questions and pertinent statements that you want to structure into the activity. Some lesson plan formats include this as a separate element. Either way, it is a valuable ready reference to induce inquiry and guide learning.

Summary

When the training is completed, it is time for a summary. A summary is important because

- it draws what could be interpreted as disparate or unrelated parts together;
- it provides a highlighted focus to the more important concepts;
- it structures valuable instructional repetition into the presented concepts;
- it provides a structured opportunity for training session feedback;
- it provides psychological closure for subsequent lessons or administrative activities.

Homework

As a final element in the lesson plan, you may include homework. You might be thinking, "What, give my trainees homework? This is no grade school!"

It is true that early experiences may have caused homework to appear arbitrary and nonsensical busy work. This is not, of course, the instructional rationale of homework. If these assignments can facilitate instructional objectives, they are an integral part of the lesson activities.

Homework should augment the training to meet not only training objectives but to meet training administrative constraints such as time and materials. Most courses of instruction require complementary readings, drill and practice exercises, and out-of-class problem-solving exercises of indeterminate time frames. You may not want to deplete valuable class time with these activities. Homework also can be a practical way to address individual trainee differences.

Keeping notes on the success or failure of various activities could be useful for your subsequent planning efforts. A formal place for reminders of things to do for the subsequent lessons is also a handy administrative tool.