



## SESSION 5

# PLANNING

### Learning Objectives

As a result of this training experience, each participant should be able to:

- ◆ List the six steps required in planning training courses.
- ◆ Explain the value and importance of carefully planned training courses.
- ◆ State two basic types of plans.

### Methods

Talk, buzz groups, projects

### Faculty Preparation

- ◆ Review “[Training Methods](#)” for tips on talk and buzz groups.
- ◆ Review the “[Training Technology](#)” session handouts for tips on making computer presentations.
- ◆ Develop the visual aid for the “Six Steps of Planning” presentation.

### Materials

- ◆ One newsprint sheet for each team
- ◆ Felt-tip markers for each team
- ◆ Overhead projector and screen
- ◆ Computer presentation equipment (computer and projector)
- ◆ [Planning 25-slide PowerPoint® presentation](#)
- ◆ [BSA 500 Answers sheet](#) for each steward

## Overhead

BSA 500 Questions

## Handout

“Six Steps of Planning” diagram

## Time

35 minutes

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## Introduction

Open the session with slide 1 of the PowerPoint® presentation on the screen. Make the following comments in your own words:

Through the ages, great works have been the result of great plans. Before mastering the human anatomy and painting the Sistine Chapel, Michelangelo spent many hours studying alongside physicians as they examined cadavers. Ernest Hemingway lived in Spain and actually became a bullfighter before writing *The Sun Also Rises*. And Robert De Niro put on fifty pounds for his portrayal of Jake LaMotta in “Raging Bull.”

Briefly review the learning objectives (slide 2).

## Pre-Planning

Ask the following questions and collect the participant responses. Answers you should emphasize follow the questions.

### **Who gives you your training assignments (slide 3)?**

- ◆ District training chairman
- ◆ Council training chairman
- ◆ Training committee

### **Do you always receive an assignment from someone else?**

No. Sometimes we give ourselves a training assignment.

### **What questions must you answer before you develop a training plan (slide 4)? (Be sure to cover the following points.)**

- ◆ What training is needed and by whom?
- ◆ When should the training be offered?
- ◆ What other events may be in conflict?
- ◆ How will training be promoted?

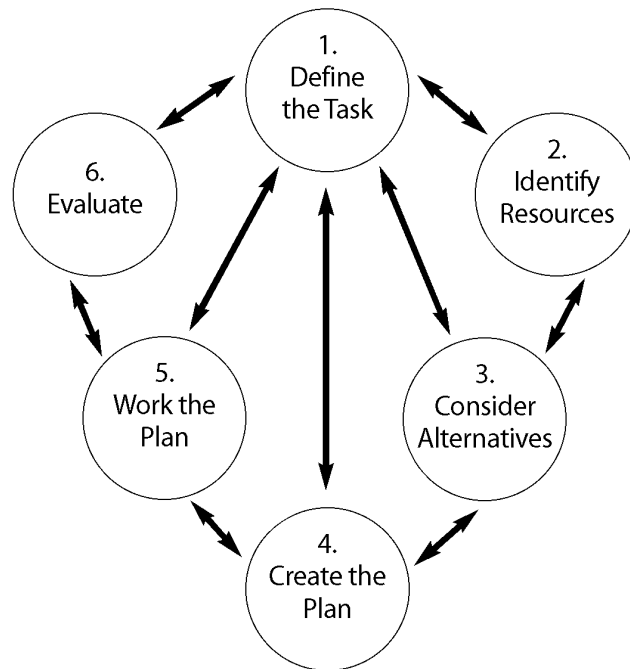
Say or paraphrase ([slide 5](#)):

No matter how you receive a training assignment, once you have accepted the challenge, the next step is to create a training plan.

## Six Steps of Planning

Distribute copies of the “Six Steps of Planning” handout.

As you present the following material, have your backup presenter build a version of the diagram that all can see, one section at a time. You might want to use colored circles on a flannel board, or use sequential overheads, or have the diagram already lightly drawn in pencil on a large chart and have your backup presenter trace it with a felt-tip marker as you make the presentation. Be sure the letters are large enough to be seen by the whole group.



### Step 1. Define the Task ([slide 6](#)).

What do we need to know about an assignment before we accept it?

We need to know *all* the facts and figures: the what, where, when, how, and who.

We need to know the objective or goal of the assignment; what we are trying to accomplish.

When we begin to answer what, where, when, who, and how, we are beginning to define the training task. At that point we may not have identified everything, but our planning process allows us to address anything that may come up as we proceed through the other steps.

## **Step 2. Identify Resources (slide 7).**

When we consider the resources needed and available, we need to ask ourselves these questions:

- ◆ What resources do we need to accomplish the task?
- ◆ What do we already have?
- ◆ Where do we get what we don't have?
- ◆ Are there any resources that require special attention, advance planning, or significant expense? Are there alternatives?

Ask:

**What kind of resources should we be considering?**

Participant responses should include trainers, equipment, facilities, refreshments, etc. Then make the point:

**As a "manager" of training, each of us must identify the resources needed and determine where we can obtain them.**

## **Step 3. Consider Alternatives (slide 8).**

Make the following points:

This step relates to alternative methods and procedures for a training course. These might include:

- ◆ Should we use overhead slides, flipcharts, flannel boards or other media for a particular presentation?
- ◆ What technique will be best for getting the message across?
- ◆ How should we arrange the tables and chairs?

(Slide 9) Alternatives should also be considered in case you must deal with an emergency or the unexpected; i.e., we should always have a backup plan (Plan B):

- ◆ Are we prepared for equipment failures? Did we bring spare projector bulbs, extra flipchart paper, extra markers?
- ◆ Do we have an alternative session element ready to use while a problem is corrected?
- ◆ Do we have back-up presenters in case one member of the training team suddenly becomes ill and cannot attend?
- ◆ Do we have modules that may be compressed or deleted, if there are time constraints?

(Slide 10) As trainers, we must set a good example when problems arise. If training courses are to run smoothly, we must be prepared for the unexpected.

We need to decide which options are best, and what alternative measures should be taken.

#### **Step 4. Create the Plan (slide 11).**

Make the following points:

Creating a workable plan can be a challenge.

Training session outlines are provided in BSA training manuals. We need to fill in the blank spaces and customize them for our situations.

A written plan

- ◆ Tells everyone concerned what is expected and when it is expected. It provides an excellent communication vehicle.
- ◆ Provides a permanent record that will be helpful the next time we conduct the course.
- ◆ Can serve as a backdated checklist.

(Slide 12) We should always put our plans in writing. We may want to include events that precede the training course, as well.

**Step 5. Work the Plan (slide 13).** These are the points to cover for this step:

- ◆ Be sure you are ready. Review the previous four steps.
- ◆ Do it! Hold the training course.
- ◆ Follow the written plan, but be flexible and make any adjustments needed.

**Step 6. Evaluate (slide 14).** Ask this question and collect the participants' responses: Answers to look for are below.

What should we evaluate about a training course?

- ◆ Did we accomplish what we set out to do?
- ◆ Would we conduct it the same way again?
- ◆ If not, what changes would we make?
- ◆ Did the participants find the information useful?
- ◆ Which segments worked particularly well? Why?
- ◆ Which segments did not work particularly well? Why?

Tell participants that most training manuals have a convenient training session evaluation form. They may want to create their own forms to gather more specific data, or the council might require them to use another form. This was probably decided when they created a written training plan.

Trainers need to determine the training what worked well and what training did not. What they learn from an evaluation becomes input to the first step of planning the next training event. Also, councils sometimes need information from the evaluation forms for trend analyses. For example, a need may exist to track training trends on a wider, council level in such areas as satisfaction, publicity surveys, and things other than just the number of people trained.

(Slide 15) Make the point that everyone should use the six planning steps to plan individual training sessions as well as larger training events, even when a written outline already exists.

## Benefits of Planning

(Slide 16) Say,

We all know that problems occur because of poor planning. But what benefits can we expect from good planning?

List the participants' responses. Make the following points if the participants do not (slide 17):

- ◆ Increased attendance at the next training session because of “word of mouth” publicity.
- ◆ Trainers build confidence and skill in handling training aids and equipment.
- ◆ Leaders receive accurate and complete information and do a better job as a result.
- ◆ Trainers know what is expected.
- ◆ Trainers stay within time limits.
- ◆ Trainers give enthusiasm and confidence to other leaders.
- ◆ Learning objectives are achieved.

Ask:

Would someone like to share an experience that would illustrate any of the benefits we discussed?

Allow time for three or four people to tell their experiences. Encourage and enlarge on stories that pinpoint the major benefits of training.

## Two Types of Plans

(Slide 18) Explain that there are two main types of training plans, short-range and long-range.

Short-range plans (slide 19):

- ◆ Meet a particular objective in the near future
- ◆ Cover a limited area of training
- ◆ Answer the question “Are we doing things right?”
- ◆ Should fit well within and contribute to long-range plans

Examples of **short-range plans** are:

- ◆ Plan for basic training sessions for newly recruited leaders
- ◆ Plan for a den chief training conference
- ◆ Plan for training roundtable staff members

Besides covering a longer time period, **long-range plans** ([slide 20](#)) are usually designed to meet more of your entire training needs, and may include a variety of training types.

A long-range training plan might include:

- ◆ An annual plan for training in the district, including Fast Start and basic training
- ◆ Makeup training sessions, personal coaching, self-study
- ◆ Den chief training
- ◆ Regular monthly roundtables and other supplemental training
- ◆ Participation in council training events

([Slide 21](#)) Trainers should not overlook the importance of long-range plans in providing total leadership growth and development program for leaders.

([Slide 22](#)) Both short-range and long-range plans are developed using the six planning steps discussed above. Planning is crucial in administering an effective training program.

## Assignment

([Slide 23](#)) Say,

We have been racing for a while now, and I can tell the spirit of competition has really begun to heat up. I know each team wants to be the winner of this BSA 500 Game. As we all know, when a race is complete, there should be a celebration. That is each team's next challenge! In the next 10 minutes, each team will

- ◆ Plan the team's victory celebration, using the six steps of planning that we covered in this session.
- ◆ Present the written plan to their team steward for approval. (Approval requires that all six planning steps be addressed.)

Everyone on each team should participate in creating the plan.

You may use material from our resource library.

Show participants where to find the resources you are making available to them.

## Summary

Make summary comments; be sure to include the following (slide 24):

- ◆ A well-planned training course is easier to present and easier for participants to understand.
- ◆ The process permits each planning step to be revisited whenever necessary.
- ◆ Ongoing improvements make training more effective.

(Slide 25) Plan your work. Work your plan.

## BSA 500 Game

Place the BSA 500 questions transparency for this session on the overhead projector, but do not turn the projector on. Announce that when the questions appear on the screen, each team will have exactly one minute to answer as many of the questions as they possibly can. The answers are to be given to the race steward at each table by the team's crew chief.

Turn the overhead projector on. After exactly 60 seconds turn the projector off, and announce that time has expired. After the stewards have determined the number of correct answers for each team, allow a little time for the crew chiefs to move their team's racecar along the track.

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## Lunch Break

Announce the arrangements for lunch. Be sure to emphasize the starting time for the afternoon sessions (allow 40 minutes).

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**To continue, scroll down to view session materials, or follow one of these links:**

[Session 6: Arrangements](#)

[Contents](#)

[Planning computer presentation](#)



# PLANNING

## BSA 500 ANSWERS

1. What are the six steps of planning?
  - ◆ Identify the resources
  - ◆ Consider the alternatives
  - ◆ Create the plan
  - ◆ Work the plan
  - ◆ Evaluate the results
  
2. What are the two basic types of plans?
  - ◆ Short-range
  - ◆ Long-range
  
3. Give one question that must be answered before developing a training plan.
  - ◆ What training is needed?
  - ◆ Who needs to be trained?
  - ◆ When should training be offered?
  - ◆ What other events might conflict with training?
  
4. What are two benefits of planning?
  - ◆ Increased attendance at the next event.
  - ◆ Confidence and skill of trainers in handling training aids and equipment.
  - ◆ Leaders get accurate and complete information.
  - ◆ Trainers know what is expected of them.
  - ◆ Trainers stay within the time limits.
  - ◆ Learning objectives are fulfilled.
  - ◆ The enthusiasm and confidence of trainers is transmitted to leaders.

# PLANNING

## BSA 500 Questions

What are the six steps of planning?

What are the two basic types of plans?

What is the one question that must be answered before developing a training plan?

What are three benefits of planning?

# SIX STEPS OF PLANNING

