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# PLANNING PROGRAMS FOR ADULT LEARNERS

A PRACTICAL GUIDE

FOURTH EDITION

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“This is a wonderful update of a true classic of our field, adding important contemporary issues and insights alongside a well-established and proven foundation. Sandra Daffron is an experienced and respected educator of adults and has positioned this powerful text to offer pragmatic value for practitioners and theoretical links for students of the field. An essential volume for anyone working alongside adult learners.”

**Ralf St. Clair, Professor and Dean, Faculty of  
Education, University of Victoria, Canada**

“This is the new edition many people and I have been waiting for. It moves the seminal work of Rosemary S. Caffarella to a next level. The nonlinear and interactive model of program planning presented in the book was never more relevant than in our rapidly changing world.”

**Bernd K  pplinger, Prof. Dr., Justus-Liebig-  
University Giessen, Germany**

“This book is very practical and useful for practitioners in the area of adult learning and education in Thai society. I am confident that all students of lifelong education in Thailand will be happy to read this book for helping them to understand and see a clear theoretical and practical framework of planning programs for adult learners in the future as adult educators.”

**Archanya Ratana-Ubol, Chair, Department of  
Lifelong Education, Chulalongkorn University,  
Bangkok, Thailand**

“The signature names of adult education and lifelong learning brought not only the contemporary update to their own leading guide of the field in both academic and practical terms. But also they have created a future-proof guide for anyone who would like to share their knowledge, skills, and experiences through new and upcoming technologies over educational platforms.”

**Kerem KÖKER, Business and Adult Education  
Consultant, Istanbul, Turkey**

“Designed with a broad audience in mind, the fourth edition of *Planning Programs for Adult Learners* has something to offer for everyone, from novice to expert, who is responsible for planning and delivering site-based and virtual educational programs for adults. Caffarella and Daffron draw on their own rich reservoirs of experience in planning programs, as well as that of their students and colleagues from around the world, to provide a systematic yet flexible guide for developing programs grounded in understanding of the characteristics of adult learner across a broad array of settings.”

**Jovita M. Ross-Gordon, Distinguished Professor  
Emerita, Texas State University**

“With the challenges of the COVID-19 pandemic, the fourth edition of *Planning Programs for Adult Learners* prepares practitioners for rapid changes and innovation. One important addition is the use of guides, prototypes, and tips for planning programs in virtual environments. This book is a must for adult educators and program planners to effectively respond to these difficult times.”

**Simone C. O. Conceição, Professor and Department  
Chair, Administrative Leadership, School of  
Education, University of Wisconsin-Milwaukee**

# **Planning Programs for Adult Learners**

**FOURTH EDITION**

**Sandra Ratcliff Daffron  
Rosemary S. Caffarella**

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Published by Jossey-Bass

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111 River Street, Hoboken NJ 07030

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*Library of Congress Cataloging-in-Publication Data is Available:*

ISBN 9781119577409 (Cloth)

ISBN 9781119577393 (ePDF)

ISBN 9781119577386 (epub)

Cover Design: Wiley

Cover Image: © elly99 / Getty Images



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# Preface

**PLANNING PROGRAMS FOR ADULT** education And training is often challenging but always exciting for those who understand and embrace a detail-oriented reality. Sometimes the challenges come when the goals and objectives of the program are unclear and ever changing. Sometimes the challenges come from mixed messages sent from those sitting around the planning table. Other times the details of managing all the administrative tasks are the challenging part of planning. But when the program is presented and all goes well, there is a real sense of satisfaction that we did what was intended: we presented a successful program to adult learners. Some programs run smoothly from beginning to end. Other programs have minor but fixable glitches, such as presenters going over their time limit or equipment not working or soggy potato chips for lunch. Still other programs seem to wander all over the place, with lots of revisions and changes along the way, and some even stall before they get off the ground. But we know that in the end, we have found our profession, our career path, our excitement and satisfaction in helping other adults as they learn and achieve knowledge, skills, and abilities and for the program sponsors, a good return on investment.

In this fourth edition of *Planning Programs for Adult Learners*, you will find many scenarios in each chapter that are true and show the challenges presented to the program planner, and then you will find solutions as you read through the chapter. For example, imagine it is the night before a conference you are organizing, and the keynote speaker texts you to say she is stuck at the airport in another region. She has been there most of the day and has

just learned that she cannot get a flight out until early tomorrow morning. Unfortunately, her presentation is scheduled for the opening address in the morning. It's time to reorganize the schedule, contact other speakers and move them into the opening session, and reschedule the keynote speaker for the afternoon. The next morning the announcement is made about the switch in schedule and the program goes forward as planned. Several attendees comment that they appreciate the way the dilemma was handled. Whew! Or there was the time that management complained to you because the new virtual reality caused by the pandemic meant the virtual meetings should be more professional without kids and dogs interrupting the agenda. Now what do I do? Even when these seemingly unmanageable problems spring up, we know programs still can have successful endings, and we feel a real sense of accomplishment and satisfaction with our work when this happens. We wrote this fourth edition to assist those who take on this challenge of putting together the many components and tasks that are a normal part of planning programs for adults.

If one searches “Program Planning Models” or checks “Images” of “Program Planning Models,” hundreds of planning models come up. But if the search is narrowed to models for planning education and training programs for adult learners, there are few. They range from conceptual and data-based studies on program planning and graphics of complicated, often linear models and how-to handbooks, guides, and workbooks. Some of the planning models are considered seminal works, such as R. W. Tyler's *Basic Principles of Curriculum and Instruction* (1949), Cyril Houle's *The Design of Education* (1972, 1996), Malcolm Knowles's *The Modern Practice of Adult Education* (1970), and Ron Cervero and Arthur Wilson's *Planning Responsibly for Adult Education: A Guide to Negotiating Power and*

*Interests* (1994). K  pplinger and Sork (2014) have provided a useful examination of the field of program planning, but they found there is little new research about planning models or even new models to be used. Among the hundreds of program planning models found in a search, most of them have limited application as they are targeted at planners who work in very specific contexts, and most are not interactive in design.

*Planning Programs for Adult Learners* is distinctive for two major reasons. First, the Interactive Model of Program Planning presented in this fourth edition both captures and reconfigures classical and current descriptions of the program planning process. The result is a comprehensive 14-component model, the Interactive Model of Program Planning, which draws on the best conceptual, empirical, and practice knowledge from across a variety of contexts—the corporate sector, continuing education for the professions, public schools, colleges and universities, health care, international development projects, social agencies, nonprofit organizations, governmental agencies, community action programs, religious institutions, and other less formal programs. In addition, the Interactive Model takes into account three key factors that make this model a viable resource for educational planners: the practicality and usefulness as a technical description of the planning process, the emphasis on stakeholders being at the heart of the process, and the recognition that we live in a globalized world where the diverse culture of the audiences attending education and training programs has become the norm and enriches the program.

Second, the fourth edition of *Planning Programs for Adult Learners* provides a concrete framework for program planning and a how-to guide and resource book for practitioners. This 14-component framework can be applied



in many ways, as there is no one best way of planning education and training programs.

Program planners are asked, for example, to select which components of the model to use and when and how to apply these components based on their professional judgment. Effective and successful planners make these decisions in collaboration with other key stakeholders. Planners also may start the process at varying points, focus on only one component at a time, or work on a number of components simultaneously, depending on their specific planning situation. In addition, they also may choose to give some tasks more emphasis than others and may need to revisit components or tasks more than once during the planning process. Therefore, program planning for adults, working within this framework, is an interactive and action-oriented process, in which decisions and choices are made about learning opportunities for adults; thus, flexibility is a fundamental norm of the planning process.

The Interactive Model of *Planning Programs for Adult Learners* serves as a practical guide and provides hands-on resources for planners, most of whom are constantly in the middle of planning one program or another. The many exhibits, figures, and checklists presented throughout the text give readers substantial information in a concise and easily usable format. In addition, in this fourth edition, we have added prototypes for collaborative e-learning and emergency staff training and a template for preparing lesson plans. We also have provided theories of adult learning as well as research articles pertaining to the many components of planning. We have created these materials to be used by planners to assist them in completing the different tasks required for successful programs.

This book is intended for novice and experienced planners who plan education and training programs for adults in a

variety of settings. It is targeted primarily at people who either have obtained or aspire to obtain positions as program planners. These people already have (or will have) major responsibilities related to planning education and training programs as all or part of their jobs. Their work settings are diverse, with multiple responsibilities. In addition, there are two other audiences for whom *Planning Programs for Adult Learners* can be helpful. The first is paid staff members who plan education and training programs as only a small but important part of what they do, whether or not planning is a part of their official position descriptions. For example, many staff members who are not identified as program planners, such as managers, supervisors, and subject matter specialists, are expected to plan education and training opportunities for their staff members. The second audience is the volunteers who develop programs for adult learners—from committee and board members of social service agencies to community action groups. The commonality among all the many audiences for this book is that they are all responsible in some way for planning programs for adult learners, whether these learners are colleagues, other staff members, customers, external audiences, or the general community.

## **Overview of the Contents**

*Planning Programs for Adult Learners* is organized into 15 chapters with numerous exhibits and figures that allow readers to see the tools for planning and a glimpse of the future of program planning. The chapters of the book lay the planning groundwork by introducing what program planning is all about, in other words, the Interactive Model that provides the framework for the remainder of the book

and the basic knowledge bases on which the model is grounded. More specifically,

- **[Chapter 1](#) provides a glimpse of who program planners are, what they do, where and when they work, and why they present programs.** The chapter presents the newest approaches to planning programs with a global look at programs in a variety of settings planning. We introduce a new topic, “Wicked Problems,” that is a focus throughout the book. A new feature, “Going Deeper,” is found at the end of each chapter and challenges the reader to dig deeper into topics at hand with an emphasis on global research and practice.
- **[Chapter 2](#) provides an overview of the new fourth edition Interactive Model of Program Planning.** Seven learning components comprise the model: context, evaluation, learning transfer, instruction, goals and objectives, needs assessment, and support. The next seven components are the seven administrative tasks that are ongoing, separate but necessary and not tied to the learning process. They are budgeting, marketing, staffing, formatting, managing details, scheduling, and negotiating. Next, there are five assumptions—change, culture, power, the stakeholders, and global problems—upon which the model is based. The five assumptions affect each of the components at differing times and with differing amounts of influence. The model is grounded and supported by three influences: ethical, political, and social justice. Comparisons are made to several other program planning models.
- **[Chapter 3](#) is a new topic, “Planning Programs in Difficult Times with Technology.”** We created guides, prototypes, and tips to use in response to the

need to help planners set up classes, training, and meetings in a virtual world created by the COVID-19 pandemic. There is a prototype for collaborative interactive asynchronous e-learning and another prototype for planning emergency staff training. We hope the ideas we provide here can help you with the new challenge of teaching, training, and/or conducting meetings virtually that no doubt will never be the same again. We believe that after the virus has been controlled, the big challenge to program planners will be to spend much more of their time planning programs and meetings using technology as their platform.

- **[Chapter 4](#) explores five areas of foundational knowledge especially important to understand in both designing and implementing programs for adults.** They are adult learning theories, ways of knowing and learning with a global perspective, cultural influences on learning, relationship building, and issues of power in continuing professional education—all drawn from the literature and practice of program planners. Each topic connects to the components of the Interactive Model of Program Planning through the examples and scenarios in this chapter and throughout the book.
- **[Chapter 5](#) describes the facets of the planning context.** We explore and discuss the issues program planners consider when using this contextual knowledge—the human element, the organization, and the wider environment. Having the ability to work within power relations and successfully negotiate difficulties allows planners to move forward with the planning process.

- **Chapters 6-10 make up the rest of the learning components of support and needs assessment, goals and objectives, instruction, learning transfer, and evaluation.** All chapters have scenarios, case studies, research, tips, illustrations, and ideas presented for a global audience. We have used information from practitioners to lend authenticity to examples and have a template for a lesson plan.
- **Chapters 11-14 tackle the administrative tasks that make up the bulk of the details needed to produce programs.** Because we found ourselves in the midst of a pandemic while the book was written, we have made every effort to provide the guidance for planning virtually in addition to these chapters that use descriptors and advice for planning programs face to face. These four chapters cover the seven remaining components of the Interactive Model: budgeting, marketing, staffing, formatting, managing details, scheduling, and negotiating. As we have found in the past 5-10 years, we have been asked to plan programs without staff. Therefore, these chapters have accounting and budgeting charts, the latest “infographic” marketing information, ideas for managing staff and advisory committees and boards, formatting to include a wide variety of techniques, managing the schedules and details of small programs to large conferences, and ideas for negotiating with venues and sales staff.
- **Chapter 15 allows readers to revisit the Interactive Model of Program Planning and glimpse what the future might hold for program planners.** A review of the current model and tasks that make this model useful are highlighted and are a viable resource for practitioners. The chapter closes with a snapshot of what the future might hold for program

planners and concludes with a short personal reflection from the authors on the writing of the fourth edition of *Planning Programs for Adult Learners*.