

The AOTA Presenter's Handbook

A Guide to Effective Communications



The American Occupational Therapy Association, Inc.

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GENERAL POINTERS

Planning and Preparation

The following guidelines should help you to plan a solid, well-structured presentation:

Find out how much time you have to speak, and plan your presentation accordingly. At the AOTA annual conference, sessions range from 20 minutes to a full day.

Be sure your presentation covers what your accepted abstract describes and that you address all of your stated learning objectives.

Gear your presentation to the "level" you identified on your proposal. However, don't EVER "speak down" to your audience. You are the identified expert, but your audience will listen more intently if they feel a collegial connection with you.

State your objectives in the beginning of your presentation and prepare concluding points for the end, before questions and discussion.

Put yourself in the participant's place. Project enthusiasm for and interest in your topic.

Try to relax. Most people are nervous presenting before a group. Focusing on a responsive person in the audience helps you connect with the audience.

Remember that audiences invariably are sympathetic to the presenter and want to hear what you have to say. However, they will not accept excuses or a sales pitch so don't do either.

While a presenter can teach, only the participant can learn. Effective learning, therefore, is a shared partnership between student and speaker. Reinforce this partnership by interacting with your audience. Ask questions and invite comments.

Involving the Audience

While it is not realistic - nor is it expected - that all presentations be hands-on in nature, we do recommend that some type of interactive component be included in your session. Our members tell us repeatedly that their preferred learning style is interactive. Some of our best, non-hands-on sessions are those in which participants are asked to take responsibility for some portion of their learning.

Involving the audience can be accomplished by providing participants with an opportunity to directly apply some of the principles they have been learning throughout the course of the presentation in order to get immediate feedback from faculty and peers. A few examples of ways in which to do this include group discussion, case studies, demonstrations, simulation, role play, and/or a structured experiential learning activity. It is important for the speaker to determine the most appropriate methods for his or her session based on the material being presented and the size of the audience. A simple "show of hands" only takes 10 seconds and can connect you to your audience.

Questions & Answers

An easy and effective way to involve the audience is to open up the dialogue between speakers and participants. Ask the group at the beginning of the presentation what they hope to gain by their attendance. Establish whether you will take questions spontaneously throughout the presentation, or if there will be a question/answer period at specific junctions. Do make sure, however, that you do build in time for questions, and try incorporating some of the following techniques:

Before your presentation, think about what questions might be asked; formulate brief, clear answers to each and rehearse those answers.

Develop some questions of your own to ask the audience in case the question/answer period begins slowly.

Throughout your presentation ask questions of the group, if only for them to answer in their mind as they listen to you. Ask questions like, "Has anyone done this? How did it work for you?"

During your presentation, answer questions to clarify ambiguities immediately. **Repeat questions participants pose to ensure that the entire audience has heard the question.** Postpone questions related to resolving individual/specific problems to the end of the session or a private discussion later.

Do not become involved in an extended dialogue with one person; take as many questions from as many listeners as possible.

If someone asks a question that you cannot answer, you have several options:

- a) Say that you will locate the answer and get back to him or her.

- b) Suggest appropriate resources that will provide the answer.
- c) Ask for suggestions from other members of the audience.

Always repeat the question, so that the entire audience hears/understands it and this serves to refocus attention on you, the presenter. This is particularly important if your session is being audio taped or if there are persons in the audience using augmented communication devices.

Large Groups

The large group is appropriate for guided group interaction, question and answer periods, feedback sessions, demonstrations, and audiovisual materials. When leading a guided discussion, the presenter should develop a list of questions and/or points that will stimulate the discussion of a specific topic.

Enriching information can be added to the session when participants are encouraged to share resources and experiences from their individual work environments. It is important to avoid recognizing the same persons over and over, and to encourage participation by as many people as possible. If the discussion begins to wander from the topic, you must redirect it. This is your responsibility.

As with other educational approaches, the discussion that follows should help participants integrate the exercise with the theme of the presentation. Large-group discussions should be shaped with lead questions presented by the faculty.

Small Groups

Small-group sessions have proven to be highly successful in occupational therapy continuing education, and it is strongly suggested that the small-group size be 6 to 8 persons. For these activities, it will be helpful to assign a group facilitator to foster the discussion and coordinate the report of the small group in the large-group format. It is helpful to describe the facilitator's role to the entire group before the participants break off into small groups.

Simulation Methods

When using audience participation in role playing, games, or simulation exercises, it may take several forms -- an activity done in dyads or a demonstration in front of the audience, for example. Whatever form it takes, a good simulation experience requires that the purpose of the exercise is clear, the rules are defined, and the players are well versed on their contributions to the scene.

Case Studies

Case studies are very effective in highlighting, reinforcing, and integrating information that is being presented. They can be presented as informal verbal "examples," or as more formal written scenarios of a particular case. Case studies can also be used to facilitate either small or large-group discussions or activities.

Speaking Skills

Speaking in front of any group (even for professional speakers) requires some effort and practice to feel relaxed, organized, and confident. Here are some tips:

1. Organize your material in the way that is most comfortable to you by using a script, notes, an outline, 3x5 cards or use the "notes" option on your power point program.
2. Rehearse, rehearse, rehearse! Rehearse by yourself and with someone. Not only will this help you to "work out the bugs" but it will add polish to your presentation. (Note: a rehearsal usually will run about 20% shorter than a live presentation; adjust your speed/material accordingly.)
3. Concentrate on deep breathing and relaxing. Expect and accept nervousness!
4. Your opening should be simple and exciting -- you only have 30 seconds to 2 minutes to convince the audience they want to listen to you. Also, be able to explain your topic or theme in one sentence that is free of professional jargon.
5. Start off with a natural pace -- not too fast and not too slow -- establishing a strong, positive image. Use natural gestures and voice inflection to add interest to your presentation. Visualize yourself giving a great speech.
6. The majority of communication is nonverbal, so how you look, sound, and come across are vital. Project enthusiasm for your subject without preaching. If you aren't interested in your subject, your audience won't be either.
7. Talk to your audience, not at them. Use eye contact often, ideally 90% of the time. **DO NOT** read your speech or presentation!!!
8. Speak in short and simple sentences (no longer than 20 words per sentence). Choose your major points carefully and illustrate each point with examples or stories.
9. **Never apologize for yourself or your credentials.** Do not criticize anything about the session, city, or setting. Criticizing starts the session off on the negative, and it's difficult to change directions. Never indicate you don't have enough time to cover a point you've made, even if it's true; the audience immediately will be disappointed.
10. Make your conclusion memorable. This will be the last thing the audience hears and takes away with them.
11. Speak for your allotted time only. Your audience will become restless (or even leave) if your presentation runs long.

Teaching Adult Learners

"What I hear, I forget; what I see, I remember; but what I do, I understand." - Confucius, 451 BC

It has been written that retention for adults 3 months after a learning experience can be broken down as follows:

90%	of what they say as they do a thing
70%	of what they say or write
50%	of what they hear <u>and</u> see
30%	of what they see
20%	of what they hear
10%	of what they read

Increased understanding related to the adult learner and his/her style and expectations will help speakers to develop presentations that will be perceived as worthwhile and meaningful by the participant. Knowledge needs are as diverse as the participants in the sessions. Each person comes with a unique set of experiences that influence what he or she expects to gain from the session. A good session leader helps each individual reach his or her goals by stimulating group interaction and problem solving.

Principles of Learning:

- Learning is an individual matter
- The degree and speed of learning are related to motivation
- Learning is more efficient when the learner's experience has meaning and when the learner receives feedback

Characteristics of Adult Learners:

- Are goal oriented
- Are less flexible
- Require longer time in the performance of learning tasks
- Are impatient in the pursuit of objectives
- Find little use for isolated facts
- Strive for recognition and success
- Have multiple responsibilities, all of which draw upon their time

Because the learning needs of session participants vary, it is important to provide a variety of instructional methods throughout the session. Enhance your teaching and the participants' learning experience by varying the teaching methods you use, incorporating diverse audiovisual materials, and involving your audience.

General Assumptions about Adult Learners

Adult learners ...

1. ... have a good deal of experience.
2. ... have set habits and strong tastes.
3. ... generally have pride.
4. ... have tangible things to lose.
5. ... have developed a reflex regarding authority.
6. ... have decisions to make and problems to solve.
7. ... have many concerns outside a particular learning situation.
8. ... are bewildered by their options.
9. ... have group behaviors consistent with their needs.
10. ... have emotional frameworks consisting of values, attitudes, and tendencies.
11. ... have developed selective stimuli filters.
12. ... respond to reinforcements.
13. ... have strong feelings about learning situations.
14. ... are often people secretly afraid of falling behind and being replaced.
15. ... can skip certain basics.
16. ... are subject to gravitational stress.

II.

AUDIOVISUAL SUPPORTS

Carefully selected audiovisual (AV) materials can be a refreshing adjunct to the teaching methods. They offer variation for different learning styles and keep the flow of the day stimulating. AV aids are an important way to reinforce and enhance the major themes of your presentation by:

- Stimulating interest
- Clarifying content
- Simplifying complex information
- Improving the listeners' recall
- Keeping you on the subject

Transparencies and Slides (overhead program, slide program, or LCD program)

Transparencies and slides are used for emphasizing key points in a presentation simply and clearly. They are not appropriate for detailed information. Your verbal explanation or handouts should provide the detail.

Use four visuals for every 10 minutes of discussion.

Use one transparency or slide for each idea or major point.

Leave a 2-inch margin all the way around the print area.

If using words, use a large font size, no smaller than 24-32 points. **DO NOT** use typewriter-size type as the basis for a visual.

Print no more than six (6) lines on a slide or transparency, using key words or phrases, not sentences. Print no more than six (6) words per line. A sample slide/transparency is reprinted on page 9.

Word slides are more visible when either black or dark blue is used as the primary lettering color, and white or a very light pastel is used as the primary background color. If using a black or very dark background color, use white or yellow as the primary lettering color.

When using a computer and LCD panel, keep in mind that the picture and colors you see on the computer screen may look much sharper than they will on a projection screen. If possible, view your computer slides on a large screen prior to the presentation to ensure the effectiveness of the font size, colors, and format you have selected.

Pictures sometimes are more effective than words to convey concepts. Make sure picture slides are neither underexposed or overexposed.

Make your visuals large and clear so that you may keep the lights on in the room. Prolonged darkness makes it difficult to take notes and is conducive to sleep!

If you must darken the entire room, but want to elaborate on a point illustrated in your visual, turn the lights on and the projector off. This will refocus the attention of the audience on you.

Transparencies can be mounted on a cardboard frame for ease in handling. Use those cardboard margins for "cheat sheet" reminders of key points.

Do not put tape on slides as this can cause the projector to jam.

Always number your slides and transparencies and reference them in your presentation notes so you know which visuals to use at various points.

Arrive a few minutes early to ensure your equipment is in focus and properly positioned.

Videotape and Film

Be sure to preview the tapes, set up the AV equipment, move the film or tape to the starting point, and prepare to troubleshoot or move into another form of presenting the material if the machines should malfunction. AV equipment is available in the Speakers' Lounge for just this purpose.

When using video, if sound quality is poor, be prepared to mute the sound and provide a narration of what participants are viewing.

After the audiovisual piece, move right into audience reaction/participation to integrate the content with other segments of the session. Help participants focus on the themes relevant to the topic at hand.

TRANSPARENCY EXAMPLE:

CAREGIVER RESOURCES:

Knowledge

Experience

Availability

Preferences

Values/attitudes

NOTE: Example of transparency using recommended type sizes with 2" border allowance

III.

HANDOUTS

Handouts are not required. Use your best judgement, and if you decide to provide a handout, use it to reinforce the information you present in a program. Handouts should only be used to supply the attendees with an outline of your salient points so they can follow the progression of your presentation. You do not want your audience to be reading your presentation. You want eyes focused on the front of the room and engaged with you, the presenter. You need to bring attention up front where you want it and discourage conversations between participants during your presentation as they discuss points in the handout. Conference sessions are much different than classroom lectures or workshop presentations. Attendees are participating in a number of sessions over several days and are not able to delve into the material with the depth expected of single topic presentations. Provide only what you need to clarify your presentation and perhaps resources for further discovery. If possible, provide your contact information if someone desires more in-depth material(s) post presentation.

Some examples of information that might be appropriate for a handout:

- Drawing, diagrams, charts (Use only if unable to reproduce as an audiovisual)
- Forms, checklists, samples (Use if an audiovisual would be too detailed)
- Glossaries, statistics (Use only if this information is critical in following your presentation)
- Article reprints (Rarely necessary; interested persons can find this information from a reference)
- Article reprints (Rarely necessary; interested persons can find this information from a reference)
- Worksheets (If participants are asked to complete a worksheet then provide it)
- Worksheets (If participants are asked to complete a worksheet then provide it)
- Bibliographies (These can be made available to those interested, but are not necessary for all participants. Instruct attendees to see you after the presentation for a Bibliography, if interested.)

Always number your handout pages for easy reference during your presentation, and include your session name and/or number on all handouts.

Familiarize yourself with the parameters that have been set up for your session type regarding the number of pages (if any) that AOTA will pay to duplicate and for how many participants. Participants will want a handout, if available, even if they soon discard it. They will also be irritated if there are not enough, even if they have little or no use for the handout after the session concludes.

IMPORTANT: You, the presenter, are responsible for securing copyright permission for any and all copyright protected material(s). This not only AOTA's policy, it's the law!

IV.

MAKING YOUR PRESENTATION ACCESSIBLE

In keeping with the policy and intent of the American Occupational Therapy Association (*Policy 5.13, Accessibility of AOTA Sponsored Events and Activities*) and the law (*Americans with Disabilities Act*) these guidelines are provided to ensure full participation of people with disabilities. The intent is not to be just "politically correct" but to create fully accessible educational sessions from which all participants can benefit.

The most important aspect of an "accessible session" is a presenter who is responsive to the participant with a disability, and who takes the lead in creating a receptive and accommodating atmosphere. Participants with disabilities want the same opportunity as all others to benefit from the session and experiential activities.

An educational session that is fully accessible addresses the needs not only of people with physical disabilities but also those with learning disabilities and hearing and visual impairments. This need not be a complicated process; often arrangements that help people with disabilities make the session better for all participants. The following suggestions can help:

Be aware of the audience. Speakers/presenters should know of any people with disabilities in the audience, and should be considerate of their needs.

Be aware of the lighting. Make sure lights are not completely turned off if your session includes participants who use interpreters. Use dimmers or spot lighting. Projectionists or whoever is responsible for lighting should be made aware of participants who are deaf or hard of hearing before the session starts.

Be aware of the seating. Make sure participants who use interpreters can sit facing the interpreter. Make sure participants who use tape recorders are near an electrical outlet. Allow adequate space for people in wheelchairs, scooters or using ambulatory aids. Make sure participants with mobility impairments are not relegated to a doorway, a side aisle, or the back of the room.

Be aware of your presentation skills. Speak clearly, facing the audience as much as possible. Avoid standing with your back to the audience or source of light. Clearly describe visual aids, including writing on slides, overheads, boards, and flip-charts. Be specific when referring to charts, numbers, demonstration materials, and chalkboard/flip-charts writing. Provide a verbal explanation of all visual materials used to illustrate the lecture. Printed versions of slides and overheads are very helpful for some visually impaired individuals. Whenever possible, use captioned films or videos. Repeat the questions and the comments of others in the session. Speak to the participants, not the interpreter.

Be aware of written information. Written information should be made available in some alternative mode: computer disk, braille, large print (14- to 24-point font), or on audio cassette. Early planning is the key for participants who are visually impaired. Make a few large-print copies of materials you plan to distribute.

Be aware of experiential activities. Make sure that everyone has a congenial partner or group, and the opportunity to participate fully.

Be aware of the language. When speaking about people with disabilities, put the person first, not the disability.

Information compiled by Shirley A. Wells, MPH, OT
AOTA Commission on Standards and Ethics (SEC) Chairperson

V.

GUIDELINES FOR PREPARING A PRESENTATION

Use them to develop your presentation. Practicing with a colleague is probably the single most important thing you can do beforehand.

Your Message

Decide what your major point is and describe it in the first 2 or 3 minutes of your presentation. This is your essential message that will help your audience understand your presentation in terms of their own setting, patient population, or research interest.

Its Context

Ground your message. Set your major point within a context by explaining where you work, your population/clients, literature review, or data collection procedures. Rather than giving detailed explanations, summarize the important variables you have used that help explain how you arrived at your major point.

Group your facts or points in small bundles with headings that easily can be understood and remembered. Turn a fact into a picture (either with a verbal description or a visual aid) to help the audience visualize what you are saying. Enumerate your points as you make them.

Expanding Your Message

Describe your intervention, research project, or topic area more fully. What were its unique components or procedures? Don't tell the audience all about your topic. Rather, think about what they would like to hear. The average conference attendee has *6-10 years of professional experience* and wants to know about intervention that works or what is new on the horizon in terms of professional issues, assessment, and intervention.

Impact/Application

Use your last 5 minutes to emphasize how your procedures, data, or issues will influence the profession. If you have presented preliminary research data, tell the audience what comes next. This is your application time to draw conclusions and/or speculate about what you did, analyzed, read, or experienced.

Since your goal is to interest your audience in your topic, be prepared for questions during the discussion period at the close of the presentation. **Since these presentations often leave the audience "wanting more," we suggest that you provide a brief handout, one page or less, for the audience including a topical outline of your presentation, references with full citations, and details on how you can be contacted for further information.**

For effective presentation in any medium, follow these six steps.

- 1) **Keep things simple.** Creating a variety of colors, images, fonts, type sizes, and animation may seem great, but it's often distracting to the audience. Be selective when designing a screen, overhead, or slide. Use one of two fonts and simple bullets.
- 2) **Choose colors carefully.** Stick to one color scheme throughout your presentation, and use splashes of color when you wish to direct your listeners' eyes to important points. Projected images are usually dim, so try high-contrast colors such as a cobalt-blue background with canary-yellow text. See also pg. 7 "Overheads & Slides."
- 3) **Practice.** Rehearse your cues for changing screens, overheads, or slides to enhance your comfort level with the technology. Build in opportunities to step away from the machine and get all eyes focused on you.
- 4) **Pause.** When you change screens, allow a few seconds of silence to let the audience take it in. Then use eye contact to engage your listeners before you speak, so that the focus shifts back to you and your message.
- 5) **Have fun.** Grab attention with the interplay of color, animation, graphics, and text, but don't allow gimmicks to overshadow you and your message.
- 6) **Stay flexible, and mix the media to make a stronger point.** Don't lock yourself into the message that's programmed on your computer. If the time is right and circumstances warrant, get out the markers and get up to the flip chart. Remember that visual aids are simply that: aids to support your message. While technology is the spark, the basics like strong eye focus, animated body language, and a well-planned message are the keys to a memorable presentation.

**Adapted from article by Peter Giuliano in the Association Educator, August 1998.*

VI.

GUIDELINES FOR PREPARING A POSTER

The purpose of a poster is to communicate the results of one's work in a forum that allows for informal dialogue and discussion. A poster is not simply a research paper glued onto a board, but rather a unique format with unique requirements. The most useful guidelines for first-time poster presenters have been distilled for your convenience:

1. You cannot communicate all the details of what you did. Instead, try to identify one or two key points you want to get across and build your presentation around them (e.g., the unique features of your new instrument; the surprising finding). Within each section of the poster, select two to three most critical points to focus on.
2. Keep in mind that you will not be available at all times that your poster is being viewed. The layout needs to provide enough information to stand alone, yet not confuse or overwhelm the viewer.
3. Think visually: Put yourself in the viewers' shoes and think about how your layout will facilitate or impede their getting your message. Some important basic principles include:
 - A. The most natural way for a reader to proceed is left to right, so start with your abstract in the upper left corner and end with your conclusions or summary in the lower right corner.
 - B. Arrange your material in columns that can be read top to bottom. Thus, a viewer can read the far left column, then step to the right to read the next section, allowing another viewer to start reading the first column. Leave a reasonable amount of space (e.g., at least 6-8") between columns.
 - C. Don't put key information (e.g., a photo or table of results) at the very bottom of a column so that a reader must squat down to see the information clearly.
 - D. Define different sections clearly. Use headings of reasonable size (larger than the text) to identify the start of each major section. Use colored backgrounds to delineate sections.
 - E. Draw a map (to scale) of your layout using the information provided by the conference organizers to see how your materials can best be arranged. Take this map with you to the conference; it's amazing how one can forget such details!
4. In addition to layout, other considerations that affect clarity include:
 - A. Print your text using the darkest possible method (laser printers are excellent).
 - B. Double-spaced text usually is easier to read from a distance and when the light is less than optimal. Less critical details can be single spaced.

- C. Larger-than-standard print is easier to read. Remember, your viewer will be standing farther away from your text than the ordinary reading distance. Experiment with different fonts (if your program/printer has them). Otherwise, most office copiers do a fine job of enlarging.
 - D. Visual displays such as graphs, photos, and tables sometimes can convey information more concisely than text. Be careful not to cram too much information on one graph, however. Color can be used effectively to highlight different bars on a graph, etc. Be sure each table has a clear label, title, or explanation placed near or on the display (not in the text).
5. Posters allow you to use color to call attention to your work.
- A. Mount your text on a colored background to set off each section. Some presenters like a second complimentary color to frame each section of text.
 - B. If you plan to mount your text, be sure to print it on good quality bond. Otherwise the adhesive is likely to cause the paper to ripple. Spray adhesive works best. Test your paper and adhesive on scratch materials first before final assembly!
 - C. Bring to Conference: push pins and a glue stick for any last minute repairs, and your layout map.
 - D. Mounting the poster ahead of time allows you to make sure everything is in order. To ensure that your poster safely survives your airplane flight, consider two possibilities: Make each section conform to carry-on luggage size and protect it with thick cardboard; bring it (well wrapped) to the passenger loading area and then give it to baggage (some say this results in lighter handling and is more likely to go directly on the plane).
6. What is your role at Conference?
- A. Many first-time presenters approach the poster session like an art show and wait quietly and anxiously while the viewers judge. But the purpose of the session is to stimulate dialogue, and you should be prepared to take a role in doing so. People who visit your poster probably choose to do so because they have some related experience or research. If they don't ask questions of you, start things off by asking some of them, such as "Do you also work with stroke patients?"
 - B. Another approach to engage viewers is to ask "Would you like a brief overview of the study?" This offer can be helpful for engaging a viewer who may be feeling a little uncertain about reading through all the detail on the poster.
 - C. It is important to have some way for people who are interested in your work to follow up with you at a later date. At some conferences, presenters have copies of poster text available for distribution to interested viewers (with mailing address

and telephone number on the front page). Some provide sheets of mailing labels; people who want a copy of the poster sent to them write their address right on the label. Having business cards to hand out also is helpful.

7. After Conference is over, then what?

Before packing your poster away, think about display options in your facility such as bulletin boards, etc. The poster easily can be mounted on foam core sheets (available at art supply stores) and then set up on table-tops, counters, etc., to show your work during an open house or other functions.

***AOTA provides a 4' x 8' poster bulletin board.**

CONTINUING EDUCATION PROGRAMS

This manual has been prepared to help you develop and present a successful presentation at the AOTA conference and other continuing education programs. The contents are based on information from informed sources and should assist you in meeting these goals:

To provide participants with a positive, practical educational experience.

To ensure that your professionalism and expertise are appropriately presented.

We strive for excellence in each of our programs, and we know you will too. Our staff is on hand to assist you in any way through all phases of program planning and implementation. If you have any questions, please do not hesitate to call on us.

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