LIGHTS, CAMERA, ACTION

Planning, Writing & Producing

Employee Education Programs

By MARCELLA R. THOMPSON

According to ASSE's "Scope and Functions of the Professional Safety Position," a safety professional directs or helps plan and develop education and training materials or courses related to design, policies, procedures and programs involving hazard recognition and control (ASSE). OSHA requires employers to provide effective information and training to employees before initial job assignment and periodically thereafter (OSHA). Performance-based safety standards expect employees to apply this knowledge and perform safely as a result.

To be effective, training presentations must make a lasting impression—somewhere between "let me entertain you" and safety "snoozer." Adult learners are a challenging audience. At times, a large gap exists between their right to know and their desire to learn.

Thus, the best approach is to view training as an investment. Each year, corporate America provides nearly two billion hours of training to 60 million employees at a cost of $55 billion (Diether 28). And it is worth the investment—some have reported a $10 to $20 return for each dollar spent on training (Kleiman 18).

So, what does a safety professional do when planning, writing and producing employee education programs? This article discusses the internal and external factors that influence program development, objectives and methodologies; identifies challenges of teaching adult learners; assesses various technologies; and follows the process of developing a training video.

INTERNAL & EXTERNAL FACTORS

Any change in a work process or procedure brings with it the need for employee education. New growth means new employees; new processes and new equipment change the workplace; and specific tasks or new operations change the work. The greatest internal factors that influence program development are verbal or written requests from employees or supervisors. In addition, safety audits and committee recommendations may document a need for training.

Beyond these internal concerns, many federal, state and local safety and health laws, regulations and standards require training—and mandate specific content and frequency. ISO/QS 9000 and ISO 14000 have training requirements as well.

EXPECTATIONS

Employee education is most effective when designed with realistic expectations and achievable goals. Remember, education is only one component of the entire behavior change process. Training facilitates this change by providing information and skills—by itself, it cannot change behavior.

ADULT LEARNERS

Teaching adults is a challenge—adults learn differently than children. They are much more selective with their learning and tend to repeat only those experiences that are satisfying and of value. Intrinsic job fulfillment, an opportunity for growth, recognition for accomplishment and financial rewards drive adults to make an investment in effort (Minter 12). For new employees, there is that all-important first impression. Orientation

TABLE 1 Primary & Secondary Program Goals

Program Goals	
Primary	Demonstrate a fulfillment of federal and state regulatory requirements for safety training with required subject(s), content and time schedule.
	Outline a clear, concise overview of the company's safety program and policies, demonstrating the company's commitment to a safe workplace, healthy employees and a protected environment.
	Relate the critical link(s) between employee responsibility for safety and product/process quality.
Secondary	Maximize use of (limited) internal EHS resources.
	Present program content consistently.
	Document training content.

TABLE 2 Sample Training Matrix

Course Code	Course Title	Complexity Level
N-01	New Employee Safety Orientation	1
C-01	Employee Right to Know	2
C-02	Powered Industrial Truck(s)	3

sets the tone for the entire employment relationship—it is directly related to the level of commitment and motivation a new employee invests in his/her job. Workers under the age of 24 are twice as likely to be influenced by the amount of training provided as by money; it appears that Generation M (those born between 1979 and 1994) values training more than any previous generation (Kleiman 18).

Generational characteristics and differences affect attitudes and behaviors, some positive, others not. Younger generations need to receive clear instructions on what behavior is expected. They must understand the connection between *why* they should work a particular way and *what* is in it for them. In addition, some members of Generations X and M may not read well or be able to follow directions (Topf 6). These individuals grew up with MTV and Gameboy—they want sizzle. Cumbersome training manuals and detailed written specifications are not quick or flashy (Bruzzese 67).

Older workers present a different challenge. Some are role models, while others are more complacent. They may be set in their ways and, as a result, resistant to change (Topf 5). In contrast to younger generations, many of the Greatest Generation and some Baby Boomers are computer illiterate—a difficult obstacle to overcome when employing the newest computer-based training technology.

Whatever the generation, choosing the appropriate intervention and communi-cation strategy in the program development stage is critical. A trainee's current experience, skills and level of knowledge about a subject greatly influence his/her learning experience. A person's ability to retain knowledge is directly related to the method(s) of instruction:

• 10 percent what they read;
• 20 percent what they hear;
• 30 percent what they see;
• 50 percent what they see and hear;
• 70 percent what they verbalize;
• 90 percent what they say and do (Lack and Kahler 574).

Thus, the safety professional must match teaching methods and modes to the targeted audience and consider learner needs and abilities when planning training programs (Campbell 38).

PLANNING

The first step is to create a training matrix. To achieve this, the safety professional must develop an outline of training required for employees to best perform their jobs effectively, efficiently and safely; identify the target audience by department and job title/function or job task/operation; and identify who is in greatest need of instruction.

Program Goals & Objectives

The trainer must also clearly identify the program's primary and secondary goal(s). Goals are broad statements of the program's intent (Table 1). For each program topic, the safety professional should list the frequency with which training will occur—initially for new or newly transferred employees and/or period-ically for current employees. Then, s/he should establish the level of complexity—level one for beginners/new employees; level two for intermediate/current employees; and level three for advanced or specialized employees (e.g., HazMat responders) (Table 2).

The next step is to develop (for each program) learning objectives that are measurable and behaviorally oriented in terms of expected outcomes for the learner (AAOHN) (Table 3). Metrics may include attendance, test(s) of skills and knowledge, and course evaluation. (Expectations of employees who fail to complete training must be outlined clearly as well.) These metrics can also be used to assess a program's overall effectiveness. All training should be documented as a record of regulatory compliance (Table 4).

SELECT THE APPROPRIATE MEDIUM

Selecting the right medium for an education program can make or break its success. The effectiveness of communication is gauged by the results (Drebinger 30). How many employees rate their workplace education programs as challenging, rewarding and stimulating? According to Godwin, good teaching is one-quarter preparation and three-quarters theater (Drebinger 37).

To guide this decision, the safety professional must answer several key questions: What are the expectations, motivations and perceived values of management, instructor and student? Are they realistic given the medium, time and budget? In addition, the safety professional must determine the maximum length of training for efficient information retention.

Four media formats are used widely in education: lecture, slide-tape, video and computer. Each has advantages and disadvantages in terms of development time and cost, presentation time and cost, and product quality (Coleman and Greene) (Table 5). Often, however, one detail is overlooked: How easily can changes be made? Given the medium selected, will subsequent content changes degrade the quality of the product? Thus, it is best to consider the long-term and plan for major program revisions every three years with minor revisions annually.

What content and essential data can be effectively transmitted through a particular medium? Information is the lowest level of thinking, with higher levels being

TABLE 3 Behavioral Terms to Use When Writing Training Objectives

Behavioral Terms						
apply	compile	demonstrate	differentiate	identify	recall	select
analyze	conduct	describe	discuss	list	relate	state
choose	critique	design	distinguish	outline	repeat	summarize
compare	define	develop	explain	name	revise	synthesize

judgment, interpretation and evaluation. Some mediums are best for teaching drill-and-practice skills while others are best for teaching skills such as problem-solving and critical thinking. Thus, the key question is, "What does the learner need to learn?" (Bennetts 65).

COMPLETE THE EDUCATION DEVELOPMENT PROGRAM PLAN

Once the medium is selected, the next step is to identify resources (personnel, time and budget) needed to develop the educational program. Here, a flowchart of events that will produce desired program goal(s) is useful. At this point, the trainer must strive to obtain initial consensus on the program plan and build-in decision and approval "stops" along the development timeline (Table 6). The remainder of this article highlights this process as it applies to the production of a safety training video.

TRAINING VIDEO PRODUCTION

At this point, the trainer must gather internal and external resources. For script writing, this may include technical content experts and editors. Production assistance may include professional talent, props, computer animation/special effects, stock footage, camera crew, narrator, music, and a professional editor, director and producer.

Writing

To begin this stage, the safety professional should outline program content and essential data, and map out the basic time sequence. The typical training video contains five parts: 1) an attention-grabbing opener; 2) an introduction that explains what will be shown; 3) the main body; 4) a conclusion to summarize key points; and 5) a memorable ending. Short transitions occur between each part, including the sections and subparts within the main body. The goal is to ensure that these transitions are smooth and seamless. A slightly longer final transition occurs between the main body and the conclusion; this is necessary to prepare the audience for the conclusion.

The typical video will run about 18 to 22 minutes. Timing for open-ing, introduction, conclusion, end and transitions are fairly standard; timing for the main body is proportioned among its subsections and parts. For example, with two sections and five parts, a 22-minute video devotes about three minutes, 36 seconds for each part, depending on the relative importance and information to be included (Table 7).

Once the program plan and content outline are approved, the script is prepared. The selected medium dictates whether the visual story is developed first. Video is a visual medium, so nothing should be written until the entire flow of the presentation can be visualized. Words are meant to fill a page, not a screen. To facilitate this process, it is best to develop a visual storyboard—a series of sketches or descriptions for the main visual elements of each scene (Utz 376) (Table 8). The audio portion should be limited to communicating basic concepts and providing essential explanation. The "style" should be simple, concise, unambiguous, genderless, and both grammatically and technically correct. Here, the best strategy is to write short sentences using present tense and precise words; it is also best to write with verbs, not nouns, and to keep in mind what the audience sees in order to avoid redundancy (Lauchman).

To complete this process, it is helpful to use a two-column format in which the visual and auditory portions appear side-by-side. When writing the script, the trainer should use punctuation to direct the narrator's inflection and note pronunciations of technical jargon or non-English words.

TABLE 4 New Employee Safety Orientation Program Plan

Program Plan	
Course Code	N-01
Course Title	New Employee Safety Orientation
Level of Complexity	1
Affected Dept.(s)	All
Job Title(s)	All
Course Frequency	Once on Day 1 Refresher on Day 30-45
Course Objectives	Identify operations where hazardous chemicals are present.
	Recall the location of the company's written HazCom program, including the list of hazardous chemicals and MSDS.
	Demonstrate how to read MSDS and hazard labels.
	Identify two methods used to detect the presence or release of a hazardous chemical.
	List physical/health hazard classes of the chemicals in the work area.
	Describe protective measures including safe work practices, emergency procedures and required personal protective equipment.
	Name two employee rights and two employee responsibilities for workplace safety.
Course Completion	Attends program AND
	Obtains quiz score >70 percent and completes course evaluation.
	A quiz score <70 percent requires remedial review with supervisor and/or safety then a retest with passing score. A second failure requires repeating the program.
Course Length	2.5 hours.
Course Schedule	Mondays afternoons (or Tuesday afternoons if Monday is a holiday).
Applicable Regulation(s)	OSHA 1910.1; OSHA 1910.1200; RI 28-21; OSHA 1910.38; OSHA 1910.145; OSHA 1910.96; OSHA 1910.120; OSHA 1910.1030; OSHA 1910.132; OSHA 1910.133; RI 28-21.

TABLE 5 Comparison of Four Education Media Using Select Criteria

Criteria	Lecture	Slide Tape / Slide Tape-on-Video	Video	Computer-Based Training
Development Time	short	moderate	long	long
Delivery	involved	coordination only	coordination only	intranet, Internet, individual unit
Cost	inexpensive	reasonably inexpensive	expensive	expensive
Changes	easy	relatively easy	dependent upon editing format	dependent upon editing capability
Input	dependent upon visual aids	camera, slides and audio: digital vs. linear	video camera audio: VHS vs. Beta	dependent upon software capability
Editing		linear editing: subsequent editing degrades tape quality	linear editing: subsequent editing degrades tape quality	dependent upon software capability to customize
		non-linear editing: maintains tape quality	non-linear editing: maintains tape quality	non-linear editing: maintains tape quality
Content	inconsistent: presenter dependent	consistent	consistent	consistent with some variety
	subject to omissions and errors	more detail	less detail	more detail
	visual aids complement content	able to present visual information	able to demonstrate skills not available in classroom	able to demonstrate skills not available in classroom *if* video capable
Primary Sensory Input	auditory-oriented	auditory-oriented: static use of visual medium	visually oriented: holds viewer attention	visually-oriented: short attention span
Human Interaction	real-time one-on-one	stand-alone program	stand-alone program	self-paced, but managed by software
Learning Capability	most-effective tool for teaching skills, cognitive thinking, problem-solving	limited tool for presenting knowledge and information	most-effective tool for presenting knowledge and information	most-effective tool for presenting knowledge and information

Not all visual elements need an audio complement; where appropriate, music can fill silences and convey "mood." Again, the trainer must select the music carefully. Background music composed specifically for videos can be purchased or one can obtain permission via a license from the publisher to use pre-recorded music (Miller 149). As the script progresses, the safety professional must stop and envision what the video looks like when the script is read aloud. S/he must then edit, edit, edit and edit again (Table 9).

PRE-PRODUCTION

Developing a production schedule is an arduous task because the work is in the details. In most cases, pre-production checklists have checklists. Thus, the trainer must create a reasonable, flexible production schedule that anticipates last-minute changes and delays. In other words, one must consider a myriad of elements in pre-production (Padgett-Thompson).

Location

If shooting on location, one must allow for travel time, set-up and breakdown of equipment. In addition, the trainer must assess electrical power needs as well as the need for extra cables, batteries, extension cords and a generator. It is also important to consider crew needs (e.g., safety, food).

Talent

The trainer must also select and coordinate on-camera talent. For legal reasons, signed releases should be obtained from anyone who is vocal or visible—even the "extras." The teleprompter or cue cards must be prepared as well.

Lighting

Light measurements should be taken at the selected location. Such information is important to the camera crew, which usually supplies three kinds of lighting: general, background and spot. Highly reflective surfaces affect video quality as much as large variations in shadow and light. A diffuser, an umbrella-like device, diffuses spotlight on a subject.

Camera

Cameras can be hand-held or placed on a moving "dolly" to pan wide shots smoothly and rapidly. Special devices allow direct input from computers and scanning-electron microscopes. Another device synchronizes video recording

SELECTING A PROFESSIONAL PRODUCER/DIRECTOR

1) Develop a clear idea of the final product and understand available budget.

2) Assess the creative and technical capabilities of prospective candidates.
•View their best video as well as one that is similar in length, style and subject to the project at hand.
•Determine what equipment will be used in production and post-production.
•Identify subcontractors—professional talent, narration, camera crew, sound technicians and editors.
•Contact references. Ask about their level of satisfaction; determine whether deadlines were met; assess the working relationship.

3) Ask candidates whether the project at hand is a realistic outcome. If not, ask what would make it so.

4) Once a candidate is selected, develop a detailed scope of work, including how much any changes will affect the final cost.

5) Designate one approval person.

TABLE 6 Sample Video Development Timeline

Desired End Result	Medium
A self-instructing education program that effectively introduces the subject(s). The target audience is/is not familiar with the subject(s).	Video

Objective	Timeline
Outline content and essential data that can be effectively transmitted through the video.	01-01
Determine the maximum length of the video for efficient information retention.	01-02
Create a flowchart of the video events, topics and segments to produce a view of the desired content. Review and approve.	02-01
Determine an appropriate budget for the project. Review and approve.	02-04
Identify and enlist outside vendors. Review and approve.	03-04
Develop storyboard showing video content. Revise, edit and approve.	04-02
Write script. Revise, edit and approve.	05-02
Develop and execute shooting schedule and audio recording.	06-04
Edit video footage.	07-04
Create final product and deliver for final approval.	08-03

with images displayed on computer and TV video monitors. If the location has RF interference, a camera with special shielding will be needed.

Audio

To ensure optimal sound, background noise must be assessed; equipment such as air handlers and public address systems can interfere with onsite audio recording. The sound(s) that must be recorded dictate the type of microphone used—such as omni, cardoid (directly overhead), shotgun (directional focus) and directional (front only). If using voiceover narration, the practitioner must schedule time with the narrator and a sound technician in a recording studio; for optimal clarity, a sound booth should be used. The greatest advantage of voiceover narration is environmental noise control. When possible, it is best to use digitally recorded and produced music as well.

Props

Props should be listed next to the visual column of the script (Table 10). If featuring product samples, one should include a contrasting background cloth on the list. It is best to hire a photography studio to take any close-up and detailed shots.

Props can also include any graphic file images or animation. Graphic files (e.g., TIFF, JPEG, BMP) must be format-compatible with the video-editing system; these files should be saved in three-color (RGB) format rather than four-color (CMYK) format (used extensively in printed media). When possible, it is best to download computer-generated images directly into video-editing equipment.

Blocking the Shots

The director prepares detailed instructions for the crew by refining the visual image. Called "blocking the shots," these instructions detail camera angles and overall movement. This is where a professional director makes the difference. Blocking has its own language. For example, MFS=medium full shot; CU=close up on subject; ECU=extreme close up; and LS=long shot (wide-angle shot of action). The camera's eye should be used to emote effect—for example, a tighter shot infers a more-important message.

The director and safety professional should conduct a walkthrough of the location before and after blocking the script (Table 10).

PRODUCTION

Production will run smoothly if preparation has been thorough. Therefore, it is critical to set up production correctly. This reduces the possibility of subsequent (and expensive) retakes. Each shot should be documented in a video log, with notations about time, scene and other key details. Action details should follow the script—it should look the way the script (and the writer) envisioned it.

Now, let's address directing and the need for continuity (Padgett-Thompson).

Directing

When recording, one should watch the monitor, not the actual set. This offers the best view of the "true" look of the finished product. Here, a professional camera crew can make all the difference. While watching, the practitioner should use a stop watch to ensure that footage recorded is at least as long as the script requires.

Camera movements should be appropriate, subtle and properly timed. Now is also the time to establish patterns for viewing transitions, wide shots and tight shots; this will facilitate editing and ensure a smooth flow. It is also useful to film a scene from different angles by shifting the camera from side to side. However, be careful to keep the camera on the same side of the stage (the "180 rule") because it is an easier transition to watch.

Continuity

Continuity is critical as well. However, discontinuity can be difficult to identify and can occur if a scene is shot at two different times. Often, the problem (e.g., an actor with a tie on/tie off/tie on again) is not noticed until the scene is spliced together in the editing suite. In addition, background details may be overlooked, such as a ladder or a mop and bucket left by maintenance personnel.

POST-PRODUCTION

The project comes together in the post-production phase (Padgett-Thompson). Again, working with a professional producer is recommended. Editing requires one to review many hours of video and audio recordings.

In this case, non-linear (digital) editing has a clear advantage over linear editing. Non-linear editing allows the editor the flexibility to create the video "randomly" and easily make additions, deletions and content changes. In linear editing, a video must be spliced together from beginning to end in the order in which the video is created. Changing already completed footage requires one to copy what has already been finished. This creates another "generation" of tape; with every successive generation, quality degrades exponentially.

TABLE 7 Content Outline & Time Sequences

Time	Content Outline	Visual	Auditory
30 sec	**Opening** w/transition		
50 sec	**Introduction** w/transition		
	Body		
	Section 1 Part 1		
05 sec	transition		
	Section 1 Part 2		
05 sec	transition		
	Section 1 Part 3		
05 sec	transition		
	Section 1 Part 4		
10 sec	transition		
	Section 2 Part 5		
20 sec	**Final Transition**		
60 sec	**Conclusion**		
40 sec	**End**		
	credits		
	Total Time		

TABLE 8 Visual Script Elements

Time	Content Outline	Visual	Auditory
		show **Title of Video**	
30 sec	**Opening**	show company name with logo close in on logo superimpose logo on product show product flying into end product 1 sequentially fly into parts 1-4 show product flying into end product 2 focus in on product with logo on it. superimpose word: *xyz* onto product close in on product	
	transition	go to inside product close in on inside product	
50 sec	**Introduction**	merge shot into second look pull back to show many products close in on specific material use superimposed words that fly onto screen then disappear into each other as the words are used and explained….	
	transition		

TABLE 9 Auditory Elements

Time	Content Outline	Visual	Auditory
		show **Title of Video**	CD 9/9: 00:00:51 - 00:01:00
30 sec	**Opening**	show company name with logo close in on logo superimpose logo on product	CD 9/9: 00:01:00 - 00:01:48 Welcome to the company, a market leader in the design and manufacture of high quality product. This company is one of the largest suppliers of product to the North American industry...
		show product flying into end product 1 sequentially fly into parts 1- 4	
		show product flying into end product 2 focus in on product with logo on it.	and brings its reputation for quality products to the worldwide industry and other markets.
		superimpose word: *xyz* onto product close in on product go to inside product	The company makes this product, commonly known as xyz.
	transition	close in on inside product	
50 sec	**Introduction**	merge shot into second look pull back to show many products	CD 9/9: 00:01:49 - 00:02:30 This product is made up of thousands of tiny components integrated into one small device or die.
		close in on specific material. use superimposed words that fly onto screen then disappear into the product...	These components are fabricated on a specific material...

Once the program plan and content outline are approved, the script is prepared. The selected medium dictates whether the visual story is developed first. Video is a visual medium, so nothing should be written until the entire flow of the presentation can be visualized.

As editing progresses, the practitioner must build-in review and approval steps, especially with technical content.
• Use consistent transitions and special effects. The more often the effect is used, the simpler it needs to be. Transitional effects can include cut, fade or movement.
• Watch for color and sound.
• Check for proper, clear pronunciation (particularly of technical terms), appropriate voice inflection and speech rate.
• List everyone who helped with production in the credits. This is particularly true when employees are involved in the development of education programs. Since they are part of the process, they have ownership of the program. Through this process, employees have learned—and had fun at the same time.

EVALUATING THE RESULTS
When program development is complete, it is showtime. Care must be taken to measure the program's effectiveness in meeting learning objectives as outlined in the overall program plan.

CONCLUSION
Planning, writing and producing employee education programs is a win-win situation for everyone. A well-designed, well-developed education program yields positive results.
• Employees learn safe work practices that prevent injuries and incidents and

TABLE 10 List Props & Block Shots

Time	Content Outline	Props	Visual
			show **Title of Video**
30 sec	**Opening**	**graphic**: company name w/logo	**MFS**: show company name with logo
			CU: close in on logo
			ECU: superimpose logo on product
		sample: appropriate product of moderate size (specify part number) for end product 1	**MFS**: show product flying into end product 1 sequentially fly into parts 1- 4
		graphic: end product 1 4 parts highlighted in 4 different colors	
		graphic: end product 2	**MFS**: show product flying into end product 2
		sample: appropriate product for end use 2 (specify part number)	**CU**: focus in on product with logo on it
			CU: superimpose word: *xyz* onto product
		sample: same product w/top removed showing interior	**ECU**: close in on product; merge w/
	transition		**ECU**: go to inside product

help them become more-effective and efficient in their jobs.

•The program development and training process keeps employees informed and involved.

•A quality presentation yields a quality learning experience and demonstrates a company's commitment to a safe workplace, healthy employees and a protected environment. ∎

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