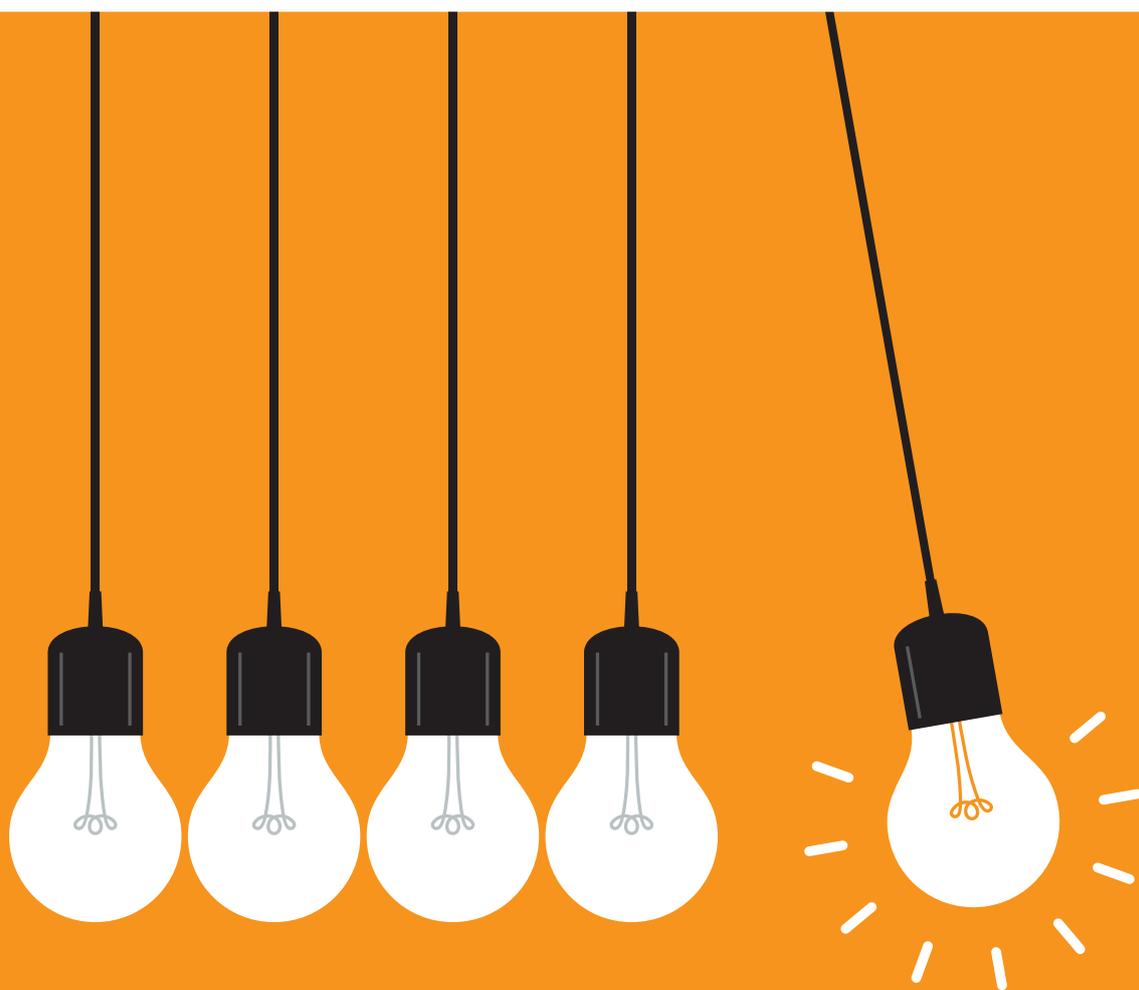


# TAEDEL301

## Provide work skill instruction

Release 1



**Learner guide**

TAEDEL301

# **Provide work skill instruction**

Release 1

**Learner guide**

Aspire Version 1.1



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### TAEDEL301 Provide work skill instruction Release 1

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## Work location

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Postal address: .....

Workplace supervisor name: .....

Phone number: .....

Fax: .....

Email: .....

## Registered Training Organisation (RTO)

Name: .....

Address: .....

Postal address (if different): .....

Phone number: .....

Fax: .....

RTO contact name: .....

Mobile: .....

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# Before you begin

This learner guide is based on the unit of competency *TAEDEL301 Provide work skill instruction*, Release 1. Your trainer or training organisation must give you information about this unit of competency as part of your training program. You can access the unit of competency and assessment requirements at: [www.training.gov.au](http://www.training.gov.au).

## How to work through this learner guide

This learner guide contains a number of features that will assist you in your learning. Your trainer will advise which parts of the learner guide you need to read, and which activities you need to complete. The features of this learner guide are detailed in the following table.

Feature of the learner guide	How you can use each feature
<b>Overview</b>	This section provides general information about the vocational education and training sector and its essential components (such as training packages), which will underpin your learning.
<b>Introduction</b>	The introduction covers the key concepts relevant to this particular unit of competency, including the terminology that will be used throughout this learner guide.
<b>Learning content</b>	Read each topic in this learner guide. If you come across content that is confusing, make a note and discuss it with your trainer. Your trainer is in the best position to offer assistance. It is very important that you take on some of the responsibility for the learning you will undertake.
<b>Templates</b>	Templates are referred to throughout the guide. These are samples of working documents similar to those found in a training organisation. Completed templates may be useful as evidence for portfolio assessments. Ask your trainer for sample templates provided with the <i>Trainer's and assessor's</i> guide for this unit.
<b>Examples</b>	Examples of completed documents that may be used in a workplace are included in this learner guide. Examples highlight learning points and provide realistic examples of workplace situations.
<b>Activities</b>	Activities give you the opportunity to put your skills and knowledge into action. Your trainer will tell you which activities to complete.
<b>Summary</b>	Key learning points are provided at the end of each topic.

## Foundation skills

As you complete learning using this guide, you will be developing the foundation skills relevant for this unit. Foundation skills are the language, literacy and numeracy (LLN) skills and the employability skills required for participation in modern workplaces and contemporary life.

The following table outlines specific foundation skills noted for your learning in this learner guide.

<b>Foundation skill area</b>	<b>Foundation skill description</b>
<b>Learning</b>	▶ Reflects on practice to improve
<b>Reading</b>	▶ Sources and interprets processes and procedures, learning resources and information relevant to providing a work instruction and delivery
<b>Writing</b>	▶ Accurately maintains learner records and documentation appropriate to the learning context and audience
<b>Oral Communication</b>	▶ Uses appropriate communication strategies to engage, build rapport, provide instruction, monitor progress and provide feedback to individuals or groups
<b>Interact with others</b>	<ul style="list-style-type: none"> <li>▶ Recognises the importance of consultation and negotiation while collaborating to confirm strategy and achieve required outcomes</li> <li>▶ Asks questions in order to clarify understanding, and to provide and seek feedback</li> <li>▶ Builds rapport to establish effective working relationships and to achieve effective outcomes</li> </ul>
<b>Get the work done</b>	<ul style="list-style-type: none"> <li>▶ Organises and completes work according to defined requirements, taking responsibility for some decisions and sequencing tasks to achieve efficient outcomes</li> <li>▶ Identifies and responds to potential risks, problems and opportunities for improvement and considers options for different approaches</li> </ul>

## What do you already know?

Use the following table to identify what you may already know. This may assist you to work out what to focus on in your learning.

Topic	Key outcomes	Rate your confidence in each section
Topic 1: Organise instruction and demonstration	1.1 Gather information about learner characteristics and learning needs	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1.2 Confirm a safe learning environment	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1.3 Gather and check instruction, demonstration objectives, and seek assistance if required	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1.4 Access and review relevant learning resources and learning materials for suitability and relevance, and seek assistance to interpret the contextual application	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1.5 Organise access to necessary equipment or physical resources required for instruction and demonstration	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1.6 Notify learners of details regarding the implementation of the learning program and/or delivery plan	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 2: Conduct instruction and demonstration	2.1 Use interpersonal skills with learners to establish a safe and comfortable learning environment	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2.2 Follow the learning program and/or delivery plan to cover all learning objectives	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2.3 Brief learners on any workplace health and safety (WHS) procedures and requirements prior to, and during, training	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2.4 Use delivery techniques to structure, pace and enhance learning	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2.5 Apply coaching techniques to assist learning	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident

Topic	Key outcomes	Rate your confidence in each section
	2.6 Use communication skills to provide information, instruct learners and demonstrate relevant work skills	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2.7 Provide opportunities for practice during instruction and through work activities	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2.8 Provide and discuss feedback on learner performance to support learning	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 3: Check training performance	3.1 Use measures to ensure learners are acquiring, and can use, new technical and generic skills and knowledge	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3.2 Monitor learner progress and outcomes in consultation with the learner	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3.3 Review relationship between the trainer/coach and the learner, and adjust to suit learner needs	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 4: Review training performance and record-keeping procedures	4.1 Reflect upon personal performance in providing instruction and demonstration, and document strategies for improvement	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	4.2 Maintain, store and secure learner records, according to organisational and legal requirements	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident

## Assessment

When you have completed your learning, you will be asked to complete an assessment. You need to understand what will be required of you regarding assessment as you work your way through this learner guide: your trainer/assessor will provide you with the relevant details. This learner guide does not include a final assessment. Your training organisation may be using Aspire's Assessment and RPL resource for this unit.

For this unit you will need to show evidence of the ability to complete tasks outlined in the elements and performance criteria of this unit, including:

- ▶ carrying out a minimum of three training sessions, involving demonstrating and instructing particular work skills for at least two different individuals or small groups, with each session addressing:
  - different learning objectives
  - a range of delivery techniques and effective communication skills appropriate to the audience.

For this unit you will need to demonstrate knowledge to effectively complete the task outlined in the elements and performance criteria of this unit. This includes knowledge of:

- ▶ learner characteristics and needs
- ▶ the content and requirements of the relevant learning program, and/or the delivery plan
- ▶ the sources and availability of relevant learning resources and learning materials
- ▶ the content of relevant learning resources and learning materials
- ▶ training techniques that enhance learning, and when to use them
- ▶ introductory knowledge of learning principles and learning styles
- ▶ key workplace health and safety (WHS) issues in the learning environment, including:
  - roles and responsibilities of key personnel
  - responsibilities of learners
  - relevant policies and procedures, including hazard identification, risk assessment, reporting requirements, safe use of equipment and emergency procedures
  - risk controls for the specific learning environment.

Always refer to your assessor for information about the number, type and detail required in the assessment materials you will be required to complete.

## Developing an evidence portfolio

An evidence portfolio is a useful way to demonstrate to your assessor how you have developed the skills, knowledge, attitudes and abilities that contribute to competence. Samples of your work that are developed as a part of the activities can be used as evidence for assessment.

Your trainer/assessor may also ask you to provide samples of documents or completed templates to demonstrate your progress in this unit. Some of these could be submitted as part of an evidence portfolio. Always follow the specific directions and guidance of your trainer/assessor to determine what documents your portfolio should include and how they should be presented.

Here are some examples of what your portfolio might contain:

- ▶ Your responses to specific activities as indicated in each section of the learner guide
- ▶ Personal reflections on your progress via an ongoing learning journal
- ▶ Recorded comments from your supervisor, peers or clients about how you have applied skills and knowledge
- ▶ Documents or completed templates\* you have developed such as assessment plans, assessment tools, training session plans or checklists
- ▶ Samples and an analysis of relevant forms, documents and other material used in a training and assessment environment

\*Throughout this learner guide, reference is made to specific templates that you can use for activities or for your portfolio. Ask your trainer for template samples; Aspire has included relevant templates in its Trainer's and assessor's guide for this unit.

# Overview

## Understand vocational education and training

There is a great deal more to the VET system and the delivery of training and assessment than the information provided in this Overview. Each learner guide for the units offered in the Certificate IV in Training and Assessment provides activities and examples to demonstrate the application of your VET knowledge.

To work effectively in the vocational education and training (VET) system, you need to understand its essential components, particularly training packages and how to use them in a training delivery and assessment role.

VET develops skills and knowledge for work through a national training system that seeks to provide consistent training across Australia. The primary purpose of VET is to equip people with the skills, knowledge and attributes they require to be 'work ready' and to operate effectively in employment. The Australian VET system comprises two fundamental elements that help ensure quality and consistency in training: training packages and the VET Quality Framework (VQF), which includes the Australian Qualifications Framework (AQF).

### Training packages

Training packages are the foundation of Australia's VET system. A training package is a set of nationally endorsed qualifications, units of competency and assessment requirements developed for a specific industry, sector or workplace. Copies of individual training packages can be viewed at: <http://training.gov.au>.

Training packages also provide the structure for competency-based training. A competency-based approach judges outcomes against specific standards established in the endorsed components of a training package. Endorsed components are the various units of competency, the qualifications within which they sit and assessment guidelines that describe the industry's desired approach to assessment and qualifications.

Training packages are developed by Service Skills Organisations (formerly by Industry Skills Councils) to meet the training needs of an industry or group of industries. Training packages are maintained in line with the National Skills Standards Council's Standards for Training Packages to ensure training packages are of high quality and meet the workforce development needs of industry, enterprises and individuals. These standards apply to the design and development of training packages for endorsement by the Australian Industry and Skills Committee (formerly the role of the now dissolved National Skills Standards Council (NSSC)).

### Units of competency

Units of competency are the nationally agreed statements of the skills and knowledge required for effective performance in a particular job or job function. In other words, a unit of competency is a set of skills and knowledge that form part of a person's job role, and represents a discrete workplace outcome.

Units of competency are packaged as groups into qualifications and qualification levels in each training package. Each qualification has a descriptor that provides guidelines on how the unit is practically applied, who would use it and the unit's relationship to any applicable licensing, legislative or certification requirements.

Training packages do not prescribe how training is to be delivered. They provide guidance on assessment and the methods of assessment that may be appropriate for each unit of competency. Registered training organisations (RTOs) are responsible for how training and assessment occur.

An RTO can also issue qualifications derived from training packages or accredited courses, or statements of attainment to recognise the completion of a unit of competency from a qualification or accredited course.

## The VET Quality Framework

The VET Quality Framework (VQF) is a set of standards and conditions used by the Australian Skills Quality Authority to assess whether an RTO meets the requirements for registration. The *National Vocational Education and Training Regulator Act 2011* (Cth) established the National VET Regulator (NVR) and underpins the VQF.

The VQF comprises:

- ▶ the Standards for Registered Training Organisations (RTOs) 2015
- ▶ the Australian Qualifications Framework
- ▶ the Fit and Proper Person Requirements
- ▶ the Financial Viability Risk Assessment Requirements
- ▶ the Data Provision Requirements.

Training that leads to the award of an accredited qualification must be delivered and assessed by an RTO that satisfies the Standards for Registered Training Organisations (RTOs) 2015. The Standards include the Essential Standards for Initial Registration and the Essential Standards for Continuing Registration. There are eight standards to which RTOs must comply.

You should familiarise yourself with the VQF and the compliance requirements it places on RTOs; this compliance directly affects the work you do as a trainer and an assessor.

## Australian Skills Quality Authority

Course accreditation agencies such as the Australian Skills Quality Authority (ASQA) set regulations and standards for the VET sector to ensure course quality is maintained through the effective regulation of training providers and accredited courses. It does this mainly through the VQF. (Note: Victoria and Western Australia have not referred their powers of regulation to ASQA and continue to be subject to their respective state regulators if they operate solely within their state.)

ASQA works with other regulatory, funding and policy bodies to ensure the training provided is of high quality and meets the requirements of industry-developed training packages, so VET graduates have the required skills and competencies for employment.

Any RTO operating solely in Victoria and/or Western Australia is regulated by those states' regulators (not ASQA), and must comply with the Australian Quality Training Framework (AQTF) Essential Conditions and Standards for Registration. The VQF Standards for NVR Registered Training Organisations derive from the AQTF standards.

Throughout this learner guide, reference is made to both sets of Standards, presented as VQF/AQTF.

## The Australian Qualifications Framework

The Australian Qualifications Framework (AQF), a component of the VQF, is a policy framework that defines the standards for regulated qualifications in Australian education and training. It specifies the learning outcomes for 16 nationally recognised qualifications. The following diagram represents the 10 levels of the AQF.



Reproduced with permission of the AQF council, from AQF Second Edition, January 2013, p. 19.

An RTO must issue qualifications and statements of attainment that align to the AQF and meet the requirements of the AQF Qualifications Issuance Policy and the endorsed training packages within that RTO's scope of registration.

## Training and assessment

The primary role of RTOs in the VET system is to deliver accredited training and assessment-based units of competency and qualifications. You may be employed by an RTO to facilitate classroom, online or blended learning; to deliver workplace-based training and assessment on-site to enterprise staff; or to coordinate and support enterprise trainers, coaches and mentors in their roles.

Alternatively, you may be an enterprise trainer whose role is to facilitate learning and carry out assessment in the workplace, perhaps based on national units of competency or internal enterprise standards. The work you do may or may not lead to a recognised qualification.

When working with training packages and before providing training or assessment services, there are two aspects of competency and units of competency that you need to understand:

- ▶ How to identify and 'unpack' the key features of a unit of competency
- ▶ The dimensions of competency and their role in ensuring that competency incorporates all aspects of work performance

## Explore a unit of competency

You should unpack a unit of competency and consider each part of the unit to form a picture of what a competent person looks like, how assessment should occur and what evidence is required.

The following table summarises the components of a unit of competency, as defined in the TAE Training and Education Training Package Implementation Guide.

<b>Component feature</b>	<b>What it relates to</b>
<b>Unit of competency</b>	
Title	The title describes the unit outcome.
Unit application	This field describes how the unit is practically applied, who would typically use it and the unit of competency's relationship to licensing, legislative or certification requirements.
Prerequisite units	This is an optional field that specifies any unit/s in which the learner must already be competent prior to achieving competency in this unit.
Unit Sector	This field is used to categorise units of competency in relation to industry sectors or types of work.
Elements of competency	Elements of competency describe the outcomes of the significant functions and tasks that make up the competency.  Elements describe actions or outcomes that are demonstrable and assessable.
Performance criteria	Performance criteria specify the required performance in relevant tasks, roles, skills (including foundation skills) and the applied knowledge that enables competent performance.
Foundation skills	This field describes the language, literacy, numeracy and employment skills that are essential to performance.
Range of conditions	This is an optional field that specifies different work environments and conditions that may affect performance. Range is restricted to essential operating conditions and any other variables essential to the work environment, so it is quite different from the previous range statement.
Unit mapping information	This field specifies the code and title of any equivalent unit of competency.
Links	This field provides a link to the Companion Volume Implementation Guide.
<b>Assessment requirements</b>	
Performance evidence	Performance evidence, as the name implies, specifies what individuals must do to show that they satisfy the performance standards in the unit of competency.

<b>Component feature</b>	<b>What it relates to</b>
Knowledge evidence	Knowledge evidence, as the name implies, specifies what individuals must know in order to carry out the work tasks described in the unit of competency safely and effectively.
Assessment conditions	This field describes mandatory conditions for assessment; for example, details of equipment and materials; contingencies; physical conditions; relationships with other people; and time frames. It also specifies assessor requirements.
Links	This field provides a link to the Companion Volume Implementation Guide.

## Explore dimensions of competency

Reviewing the dimensions of competency is an important part of unpacking a unit of competency. The dimensions of competency relate to all aspects of work performance in both routine and non-routine work situations. A competent person can successfully apply their skills and knowledge to work activities in a range of contexts.

The following table explores the four dimensions of competency in more detail.

<b>Dimensions of competency</b>	<b>Meaning</b>
Task skills	The candidate must perform the individual skills required to complete a work activity to the required standard.
Task management skills	The candidate must manage a number of different tasks to complete a whole work activity, such as working to meet deadlines.
Contingency management skills	The candidate must use problem-solving skills to resolve issues that arise when performing a work activity.
Job/role environment skills	The candidate must perform effectively in the workplace when undertaking a work activity by working well with all stakeholders and following workplace policies and procedures.

## Incorporate foundation skills

Foundation skills are the non-technical skills that support an individual's participation in the workplace, the community and in education and training. In training packages, the foundation skills can incorporate the language, literacy and numeracy (LLN) skills described in the Australian Core Skills Framework (ACSF), and the employability skills described in the Core Skills for Work Developmental Framework (CSfW).

Foundation skills underpin competent performance and are identified in each unit of competency in a foundation skills table. The foundation skills should be considered an integrated part of the unit for delivery and assessment purposes.

## FSK Foundation Skills Training Package

The FSK Foundation Skills Training Package was developed to work in combination with other training packages to support the development of learners' core skills, so they can achieve their vocational training goals. Trainers have an opportunity to use material developed, such as those developed by Aspire Learning Resources, to deliver foundation skills to learners. RTOs have an opportunity to deliver training and qualifications in foundation skills units to support their students.

IBSA's Building Strong Foundations resource provides information about using the Foundation Skills Training Package. You can access Building Strong Foundations at this website:

- ▶ [www.ibsa.org.au](http://www.ibsa.org.au)

The Foundation Skills Training Package Implementation Guide also contains an explanation of the use of this training package. You can access it at this website:

- ▶ <https://vetnet.education.gov.au>

## Assessment methods

The competency-based assessment system relies on an assessor making a judgment about a person's competence against performance benchmarks in a unit of competency, using methods such as criterion-referenced assessment, standards-based assessment or evidence-based assessment. An assessment candidate should be judged as either competent or not yet competent according to whether they demonstrate that they can meet the specified standards.

## The recognition process

The recognition process allows candidates to provide evidence that their previous training, work or life experience aligns to the skills and knowledge described in a qualification or unit of competency.

Recognition of prior learning (RPL) is one form of this process. Recognition can also include recognition of current competency and credit transfer.

Evidence of competency may include work samples, journals, certificates of achievement and third-party testimonials. In addition, candidates may be asked questions, observed undertaking set tasks or asked to demonstrate the authenticity of their work.

RTO staff must be able to provide clear, accurate information on assessment and recognition processes to candidates. Your obligations could therefore include:

- ▶ advising and assisting a candidate/learner to apply for recognition
- ▶ determining the type of recognition for which the candidate/learner should apply
- ▶ assisting the candidate/learner to complete relevant documents
- ▶ processing recognition applications in a timely manner.

Candidates may apply for recognition before the learning program commences. In other cases it may become apparent as a learner progresses through training delivery that they have the skills, knowledge and competence to satisfy the assessment requirements for a unit of competency or a cluster of units.

# Introduction

## Provide work skill instruction

Organisations need a skilled workforce to undertake the vast array of tasks and activities that are required to produce products and services. Organisations need to continually review the competence of workers and identify areas where further training is required in response to changing work practices, new products, emerging technologies and revised legislation and regulations.



The task of providing work skill instruction often falls to supervisors and specialist staff from within an organisation. This could involve supporting an apprentice or trainee, or a staff member who is studying with an external training provider. Many medium to large organisations have specialist staff who coordinate training activities. They rely on technically skilled staff to help promote a learning culture by assisting workers to participate in training and transfer new learning to their job role.

Providing work skill instruction could involve coaching a new employee; demonstrating skills, methods and techniques; asking questions; supervising practice and giving feedback; checking performance and skill acquisition; and evaluating and reporting on the effectiveness of the training structure.

## The learning environment

Trainers have a duty of care to learners and other employees or visitors in the learning environment. Before providing work skill instruction, trainers must identify and address hazards in the learning environment. Trainers must understand the workplace WHS system and apply relevant policies and procedures; they must also be skilled in operating and maintaining any equipment or technology involved in the learning process.

In addition to creating a safe learning environment, a trainer must also apply communication and interpersonal skills to create a comfortable and inclusive learning environment.

Experienced trainers understand that creating a comfortable environment and engaging with learners is fundamental to effective learning. Part of the skill of being an effective trainer is being able to create a positive, non-judgmental atmosphere, embracing difference and diversity, and acknowledging the contribution and efforts of all learners.

Trainers need to continually practise and refine their communication, observation and interpersonal skills to build appropriate relationships with learners and encourage a collaborative approach to learning.

## Evaluating the success of work skill instruction

Training new and existing employees requires a significant investment from an organisation. Training performance and learner skill acquisition must be monitored and evaluated to demonstrate that the investment in skill development is delivering measurable outcomes. Any review of training outcomes should measure improvements in workers' post-training performance and trainers' effectiveness.

## What this unit covers

This unit of competency, *TAEDEL301 Provide work skill instruction*, describes the skills and knowledge required to conduct individual and group instruction, demonstrate work skills and assess the success of training and one's own training performance, using existing learning resources in a safe and comfortable learning environment.

It emphasises the training as being driven by the work process and context, and applies to a person working under supervision as a work skill instructor in a wide range of settings not restricted to training organisations.

## Your job role

This learner guide will assist you to develop the competence required to conduct individual and group instruction and demonstrate work skills using existing learning resources in a safe and comfortable learning environment. You will also develop the skills and knowledge required to determine the success of the training provided and your own personal training performance. The focus in this learner guide is on training that is driven by the work process and context.

- ▶ Your job role requires you to provide instruction or demonstration of work skills. This could involve training your work team or providing training to an individual or group from various sections of the organisation.
- ▶ You may be employed by an organisation that requires you to present instruction or demonstration to workers in other workplaces. For example, you may work for a manufacturer in a job that involves providing training to clients on the correct use of your products.
- ▶ You may be employed as a consultant who delivers training in workplaces that is designed to improve generic or technical skills that are not recognised by a national qualification.
- ▶ You may have developed a reputation as an expert or have experience or qualifications relevant to specific work skills. Your employer may ask that you be responsible for coaching less-skilled workers.
- ▶ You may be employed as a trainer in a registered training organisation (RTO) that provides training and assessment to learners who wish to gain nationally recognised qualifications.
- ▶ You may be employed in a workplace that is also registered as an RTO (an enterprise RTO).
- ▶ Your job role may be in the organisation's learning and development team, where you train workers in various sections of the organisation.

## What you will learn

In this learner guide you will learn how to:

- ▶ organise instruction and demonstration
- ▶ conduct instruction and demonstration
- ▶ check training performance
- ▶ review training performance and follow record-keeping procedures.

## Essential learning points

The information in guide unit is based on an understanding of the following concepts and issues.

### Learner characteristics

It is important to develop a profile of each learner prior to work skills training. Delivery plans should be designed to ensure access and equity so you can provide the relevant support. You must identify whether a learner has literacy, language or numeracy issues, a disability or any other issues that may affect their ability to participate in training.

Speaking with the learner and observing them in their workplace or a group learning environment will allow you to gather sufficient information about them to prepare a profile. In some cases you will have already developed a relationship with them when supervising them in the workplace; in other cases you may only come into contact with the learner occasionally if you are delivering training to groups of employees from various parts of the organisation. If you have had no previous contact with the learner, be flexible in your delivery technique until you learn more about them.

### Safe learning environment

Workplace learners often use unfamiliar equipment, technology or work practices. Trainers have a duty of care to everyone in the learning environment and must take action to prevent any foreseeable harm or injury occurring. Workplace WHS policies and procedures for emergencies, personal protective equipment (PPE), access and egress, and equipment operation must be complied with by all those involved in the training session.

### Instruction and demonstration objectives

Objectives are an essential component in any learning program or delivery plan. It is essential for trainers and learners to understand what they will achieve by participating in training activities. Trainers should refer to the objectives to help them choose learning resources and materials and delivery techniques, and to decide how to best manage their time when delivering training. Learners can refer to (or be reminded of) the objectives in order to stay engaged and motivated. Other people who have an interest in workplace training, such as managers and human resources staff, also use objectives to evaluate the success of learning programs.

### Learning resources

Learning resources support engaging and effective training sessions. Learning resources may be purchased 'off the shelf' from an educational publisher, or created in-house for specific learner groups.

Learning resources are the tools that you will use to support the achievement of learning outcomes, so it is important to take the time to check their suitability and availability and carefully plan how you will use them to support content delivery and skills practice.

Learning materials are often sourced from the workplace. They may include signs, handouts, videos or instructional recordings, work samples, policy documents, standard operating procedures, forms and templates.

Work samples can be used to demonstrate:

- ▶ the performance standard that learners are expected to achieve
- ▶ the various steps in producing a complete product
- ▶ the defects that can occur when instructions aren't followed correctly.

## WHS procedures

You need to understand and apply workplace health and safety (WHS) policies, procedures and requirements relevant to the workplace when you provide work skill instruction.

## Delivery techniques

There are various delivery techniques that trainers use to provide instruction in the workplace. Practising skills in coaching, demonstrating, facilitating groups and other delivery techniques will equip you to select the technique that is most appropriate for learners and your instruction needs in each training situation.

## Coaching

Coaching is about regularly observing learners in their workplace and being on hand to give advice, guidance and additional instruction when required. Effective coaches have the interpersonal, communication and observation skills required to give constructive advice and encouragement to learners as they apply new skills and knowledge in the work environment.

Coaches evaluate learner progress so that they can give an appropriate level of support. The goal is to gradually reduce the level of support so that learners eventually work independently.

## Measures for checking performance

In addition to providing information to the organisation about the return on their training investment, measuring learning outcomes allows trainers to evaluate learner skill acquisition and readiness for transferring skills to the workplace. The trainer can then take remedial action, such as adjusting the learning program, when necessary.

Measurement can occur through self-assessment, review, discussion, survey and observation.

## Access and equity issues

You must provide work skill instruction in a way that does not discriminate on any basis or cause offence through cultural or language misunderstandings. You should remain alert to diversity requirements and recognise any actual or emerging disability issues so that you can organise appropriate assistance and support in a timely manner.



## Topic 1

In this topic you will learn how to:

- 1A Gather information about the learner**
- 1B Ensure a safe learning environment**
- 1C Gather and check instruction and demonstration objectives**
- 1D Access and review learning resources and materials**
- 1E Organise equipment and physical resources**
- 1F Notify learners about implementation of the learning program**

## Organise instruction and demonstration

Organisations that regularly review the competence of employees and implement learning and development programs to improve workforce skills and knowledge have a competitive edge.

Workplace learning and development can include formal training and assessment programs conducted by an RTO and work skill instruction by workplace personnel. In many organisations a significant amount of training is also provided to individuals and small groups by supervisors, team leaders, frontline managers and specialist personnel such as WHS representatives.

Effective planning is the basis of effective skill development programs and work skill instruction. A detailed learning program and delivery plan are used to organise resources, inform the learner, monitor and evaluate the training, and measure the outcomes.

# 1A Gather information about the learner

A trainer providing work skill instruction and demonstration must ensure that learners have every opportunity to gain the skills and knowledge offered by the training in which they are participating. To deliver a learning program effectively, you need to find out as much as you can about individual learners. You should also address any social and cultural issues that may affect learning; there may be background issues such as the learners' past experiences of learning and education, or language and literacy levels to consider.

There may be times when the learner has been directed to attend the session by their supervisor or manager and is a reluctant participant. Establish the reason their supervisor or manager is requiring the learner to attend so you can stress the benefits for the learner, from the learner's perspective.

Gathering information about learner characteristics and learning needs helps shape the arrangements that you make to provide work skill instruction and the specific techniques that you use to structure, pace and enhance learning to optimise outcomes.

## The trainer's role

In an organisation that values learning and skill development, team leaders, frontline managers and supervisors will be called on to develop work groups and individuals. They do this by identifying a group's learning and development needs and then creating short- and long-term training plans for the work group and its individual members.

You may have been given responsibility for providing work skill instruction for your own team or for a group of workers from other parts of the organisation. Providing work skill instruction will likely form part of a learning program. It might involve using training methods such as job skill instruction, demonstration and coaching. Work skill instruction also involves monitoring performance and supporting learners to apply their skills and knowledge in the workplace. It is important to give feedback and take action to provide additional training or support where necessary.

You will need to discuss and confirm training needs with the human resources department or manager as well as the learner.

## Identify learning needs

Employee skill and knowledge needs vary. There may be specific requirements for a particular task or project; skills may be needed for the work group to operate as an effective unit; or perhaps individual workers need to develop technical, communication or interpersonal skills to assist career progression.

Getting the best performance from employees requires that their learning needs are identified. Correctly identifying learning needs is crucial to providing effective and appropriate skill development.

## Strategies for identifying learning needs

Skill development needs can be identified using a formal process such as a training needs analysis (TNA). This process identifies skill or knowledge gaps that can then be addressed through training. You may be asked to participate in the TNA by conducting a skills audit for your work group. Or perhaps a TNA has already been conducted and you will be able to see the results. This information can give you a good understanding of the focus for the work skill training you will be undertaking.

## Use job descriptions to determine the skills and knowledge needed

Before determining skill gaps, make sure you understand the organisation's business plans, goals and objectives. Identify long- and short-term goals and the accompanying skills the organisation needs in its employees to achieve those goals.

The criteria in a job description help establish the level of performance (the desired competencies) for that position. A job description may also define the qualifications or experience a person must have to be considered for a position.

By matching the person's current duties with those outlined in their job description, you can see whether the role has changed and whether the person needs additional skills or knowledge to handle new responsibilities or technology.

## Use a workplace skills audit to establish current skill levels

An accurate skills audit provides an overview of the person's current job role, the nature of their work and how they perform it. The most common way to conduct the audit is to develop a survey consisting of general questions relating to the position and job role and a questionnaire listing a bank of skills and knowledge required by the organisation.

Ask your supervisor whether this process has occurred and examine the outcomes. This information will add to your understanding of the needs of the group and the training you will be undertaking.

## Match worker skills to the skills defined in competency standards

Competency standards describe the skills and knowledge required of a worker to effectively and efficiently undertake the day-to-day tasks and duties of their particular job function. Most industries in Australia have developed sets of competency standards for particular job roles in each sector; these are recognised by employers and vocational education and training organisations.

Formal assessment requires a person to provide evidence of their competence for each of the critical aspects of assessment identified in the competency standard.

### Competency standards

- ▶ Industry-specific competencies such as plant operation
- ▶ Generic work-related competencies such as teamwork and time management

## Arrange discussions and personal appraisal sessions

Many organisations conduct a formal session with each of their employees at least once a year to discuss their performance and professional development needs. A performance appraisal helps to determine skill and knowledge gaps and is an opportunity to develop a learning plan for the next 12 months. An individual may need training in a specific area or be given opportunities to further develop their skills through increasing their responsibilities.

Employees may approach their supervisor to discuss their learning needs because they have identified a learning gap that needs to be addressed if they are to perform their duties effectively.

## Other ways to identify skill gaps

Third-party reports and feedback may be completed by supervisors, customers, peers and any other person qualified to comment on the performance of an individual staff member.

Observing a work team on a day-to-day basis is one of the best ways to identify learning needs. Skill gaps or areas for further training can be identified by:

- ▶ watching how workers handle their tasks, deal with others and follow procedures
- ▶ looking at the product quality
- ▶ observing workers' ability to solve problems.

## Learner characteristics

You should try to find out as much as you can about the characteristics of individual learners that you will be training. Identifying individual characteristics and needs during the planning stage will allow you to provide a better learning experience at the individual and group levels.

Learner characteristics and needs shape how to structure and deliver the training, the length of the training sessions, resources required and the type of support that may be needed in the workplace following training. All these factors will have been considered in the design of the program.

Being aware of learner characteristics may help you identify delivery methods and techniques appropriate to individuals or the group and provide a better learning experience at the individual and group levels.

Some characteristics may lead you to seek advice and support from LLN specialists or organisations with expertise in working with particular cultures or learners who have special needs.

### Learner characteristics

- ▶ Language, literacy and numeracy (LLN) levels
- ▶ Physical or psychological needs
- ▶ Employment status
- ▶ The person's occupation, type of work or skill base
- ▶ Past learning experiences
- ▶ Work experience
- ▶ Familiarity with equipment
- ▶ Computer skills
- ▶ Level of maturity
- ▶ Cultural background
- ▶ Level of formal schooling in Australia or overseas
- ▶ Length of time the person has been resident in Australia

## Gathering information about learners and learner characteristics

When handling and reviewing personal information about learners, be mindful that as a trainer and/or workplace supervisor or team leader you have ethical and legal obligations to comply with, such as your workplace privacy and confidentiality policy and procedures.

### Documentation that may help you to identify learner characteristics and needs

- ▶ Information recorded during the recruitment process
- ▶ Employee employment records, such as length of employment, classification, training record and their current job description
- ▶ Training needs analysis
- ▶ Skills audit
- ▶ Written or verbal reports from supervisors, colleagues and technical experts
- ▶ Your own observations
- ▶ Formal performance appraisals
- ▶ Questionnaires completed by the learner
- ▶ Formal testing conducted by the organisation

## Language, literacy and numeracy

Different industries, professions and even workplaces within the same industry have different ways of communicating at work and documenting work practices. The underpinning skills that are needed to carry out communication and documentation are referred to as language, literacy and numeracy (LLN) skills.

Before undertaking work skill instruction you need to understand the broad LLN skills levels of learners. LLN skills affect the outcomes of training and assessment.

The learning program you implement must also take into account the LLN demands of the workplace and its practices. If a learner does not have the LLN skills needed to undertake training to develop work skills, you may need to arrange for LLN support from within your organisation or from an LLN expert or consultant.

Ask yourself the following questions in relation to the workplace or industry context:

- ▶ To whom does the learner need to speak?
- ▶ What will the learner need to say?
- ▶ What documents will the learner need to read?
- ▶ What documents might the learner need to complete; for example, will they need to complete a checklist or write a report?
- ▶ What calculations will the learner need to perform or understand?
- ▶ What information will the learner need to receive and in what format (verbal, written)?

## Learning theory and the principles of adult learning

An understanding of the theory of how adults learn, together with an appreciation of the principles of adult learning, are used to help select a delivery technique, structure the session and monitor the learners' progress.

Theorist Malcolm Knowles proposed a model of adult learning that is based on five key assumptions about what drives adult learning. Researchers have proposed other theories of adult learning, but the Knowles is one way of viewing and understanding adult learning.

Knowles's principles of adult learning and examples of their application are described in the following table.

Theoretical principle	Explanation and application
Adults are relevancy-oriented – the need to know	<p>Adults need to see the reason why they need to learn something; that is, how they will be able to use the new skills and knowledge.</p> <p>For example, an accounts clerk is unlikely to see the relevance of learning how strategic plans are prepared; however, she is likely to be very interested in understanding how to prepare business activity statements.</p>

Theoretical principle	Explanation and application
<p>Adults are autonomous and self-directed – the learner self-concept</p>	<p>Adults need to be responsible for making their own decisions; they want to be treated as capable of self-direction. The trainer is really a facilitator supporting the adult learners to learn.</p> <p>Forcing adults to participate in activities is unlikely to lead to a successful learning outcome, so be prepared to offer a variety of activities and to ask the learners for their opinions and suggestions.</p>
<p>Adults bring life experiences and existing knowledge with them to new learning – the role of learner experience</p>	<p>Adult learners already have a range of life experiences that are a resource for learning. These experiences, however, can lead to biases and assumptions. Adults should be treated as equals and their existing experience, knowledge and skills should be respected.</p> <p>Learners' life experience should be used to provide a connection to the new knowledge and skills being learnt. If workplace trainers know about each learner's existing knowledge, skills and experience and why they are participating in the training, they can link the content to the learner, making it more real for them and also satisfying the adult need for recognition.</p>
<p>Adults are practical – the readiness to learn</p>	<p>Adults must see how the new knowledge and skills will help them. They are ready to learn the things they need to know to cope effectively with work and life situations.</p> <p>Work skill instruction has the benefit of being relevant and meaningful as it can be applied immediately to the learner's work role.</p>
<p>Adults are goal-oriented – orientation to learning</p>	<p>Adults want to know how the training will help them achieve their goals. They are motivated to learn to the extent that they perceive it will help them deal with tasks and decisions they confront in daily work and life. Trainers can facilitate this perception by reinforcing the relationship between the session and learners' goals.</p>

## Learning principles

A basic understanding of the principles of adult learning also contributes to effective work skill instruction. Compare the principles outlined in the following table with Knowles's theory and you will see points of similarity (principles are presented along with an explanation and example).

### Adults learn in different ways

- ▶ Effective trainers know that they need to have a flexible approach to delivering training. They observe their learners, they use a range of delivery techniques and they ask for feedback. This may include asking them at the end of a session how they found the delivery of the information and what could be done to improve and assist with their learning.

### Adults need to know why they are learning

- ▶ Trainers need to explain the objectives of the training at the outset. This includes explaining to learners why it is relevant to them. How will they benefit from participating in the training?
- ▶ For example, Jack isn't happy. He's been asked to watch a product launch. Jack believes that everything he needs to know as the product installer will be in the product manual.
- ▶ Mandy, the marketing manager, begins the demonstration by explaining that this new product is expected to be a big seller for the company and there will be a range of options that the customer can select from – even during the installation.
- ▶ It is important that all staff understand the options in order to participate in an incentive scheme.

### Learning and experience are connected

- ▶ Adults benefit when they can apply the instruction or demonstration to their life or work experience.
- ▶ Applying the information to a specific situation helps them to make sense of the learning.
- ▶ Ben is attending compulsory first-aid training in his workplace. His concentration wavers as he thinks about the work waiting for him.
- ▶ Toby, the instructor, realises that several of the participants are not focused. He provides a vivid example of an incident that has occurred in a similar workplace and explains how first aid should be administered in that type of situation.
- ▶ Ben realises that this type of incident could occur in his work area and he isn't sure where the first-aid box is located. He puts his hand up to ask a question.

### Adults can self-evaluate

- ▶ Adult learners can reflect on their own performance during and after training.
- ▶ The practice manager at a major law firm regularly conducts training for administration staff to improve performance. She has devised an electronic journal that encourages staff to reflect on the effects of training on their performance. They also record any areas in which they need additional training. The journal is used during performance reviews to set goals.

## Learning styles

Some people like to learn in their own time, at their own pace and on their own. Learning in a group provides a more structured format with the opportunity to interact with others. Some people prefer action learning, which involves 'learning by doing'. Many people prefer a mix of delivery styles, depending on the type of information provided. For example, they may like to read by themselves, view some diagrams to assist their understanding, have someone who they can discuss the topic with and then put the learning into action.

While everyone has an individual style of learning, you may find a learning style is preferred more by certain groups of people. For example, young workers and people born or educated in countries other than Australia may demonstrate a specific type of learning style preference.

Before organising instruction and demonstration you should try to identify learners' learning styles. There are three basic styles in which people learn or process information: visual, auditory and kinaesthetic. These terms are described below.

### Visual

Learners respond to visual information such as demonstrations, visual displays and books; they are unlikely to enjoy attending an instruction session unless the trainer includes audiovisual and other visual aids.

In addition to demonstration, consider using activity sheets, learner guides, books and standard operating procedures.

### Auditory

Auditory learners prefer learning by hearing; for example, through verbal instruction or audio recordings. They are likely to prefer to hear verbal explanations rather than being asked to read learner notes. Question and answer sessions, coaching and recorded instruction sessions are appropriate.

### Kinaesthetic

Kinaesthetic learners learn by doing. These learners respond best to being able to try things for themselves; for example, in an instruction session for creating a spreadsheet they will be the ones who are more likely to investigate software menus and press keys to see what happens.

## Other learning factors to consider

### Formative experiences

The learner's prior work experience, education and qualifications and their general life experience all play a role. These factors influence how actively the learner participates in training and their attitude toward training and instruction, as well as the existing skills and knowledge that you can build on.

### Specific needs

You need to ensure that all learners benefit from training and instruction. Before organising and conducting instruction and demonstration, gather as much information as you can about the specific needs that learners may have. For example, a learner may have physical or psychological needs such as a learning difficulty. Strategies you can apply to address these needs might include arranging for specialist support or modifying the training environment.

### Workplace culture

Workplace culture is the 'way of life' in an organisation. It encompasses many characteristics of an organisation such as the physical environment, employee attitudes, communication methods, management styles, quality systems and approaches to innovation and change. Workplace culture influences the way people interact and how they go about performing their daily routine. You should consider the influence of workplace culture when you are identifying training needs and performance standards.

### Privacy, confidentiality and ethics

All workplaces are required to comply with the *Privacy Act 1988* (Cth). This legislation affects the information that can be collected from learners, how that information may be shared with others and how it is stored and, ultimately, archived or destroyed by the organisation.

You will need to comply with workplace policies and procedures relating to privacy and confidentiality when planning and implementing training. See Section 4B of this learner guide for further detail.

Likewise, you must comply with legislation relating to discrimination and equal opportunity to ensure all learners are treated equitably.

### Workplace arrangements

Your contribution to work skill instruction must accord with the industrial relations systems and processes, awards, and enterprise agreements that operate in the workplace. For example, when scheduling training activities outside normal shift arrangements you should be aware of the potential overtime cost to your employer.

The following example demonstrates the process that is used by a subject expert to prepare a demonstration for work colleagues.

#### Example

#### Gather information about the learner

Metro Area Health Service is implementing an initiative to help tackle the problem of youth suicide in an inner-city suburb. Mental health workers from various services in the area are invited to attend a one-day workshop to launch the initiative.

The event includes an instructional presentation from Franco, a specialist in youth suicide. Franco works in one of the mental health services that has personnel attending the workshop. His colleagues respect him as an expert in the area of youth suicide because he works at the cutting edge of research into the problem. He is one of the driving forces behind the initiative.

In planning his presentation, Franco works with a member of the organisation's learning and development team to prepare a pre-workshop questionnaire that will be sent to people when they register to attend. The responses and information supplied will help Franco structure a presentation that is pitched at the appropriate level, includes examples that are relevant to the issues that staff face and will contribute to their skills and knowledge for dealing with at-risk youth.

Franco is aware that the Metro Area Health Service staff reflect the cultural diversity of the inner-city area where they operate. He realises that he needs background information about the audience, their cultural communities, their literacy levels and their educational backgrounds so that he can tailor his presentation to accommodate the diversity of the audience.

# Activity 1

1. Read the case study, then complete the tasks that follow.

## Case study

The management team at D-Mac Manufacturing are concerned about lost-time injuries in the plastic products area of the plant. Comprehensive WHS induction training is provided to all new employees. Signs and posters are displayed around the plant to promote safe work practices. Team leaders are responsible for monitoring the performance of workers on the job, including their compliance with standard operating procedures.

At a team leaders' meeting, Johnnie from the moulded products team raises the point that the majority of workers in the plant are Vietnamese. In fact, very few of the workers were born in Australia or have English as their first language. Johnnie asks, 'How am I supposed to effectively coach workers who don't always understand what I'm talking about because they don't understand the procedures well enough?'

Yvonne, a team leader in the plastic film production area, agrees. 'All of the training materials, signs and instructions are in English. Some of the stuff is complicated. I find it hard to understand, so what hope do ESL speakers have?'

It is agreed that refresher training must be provided for all production personnel, but that there needs to be a whole new approach to how training and skill development occurs.

Marc, the company's workplace health and safety officer, will conduct WHS training.

- a. Write a plan that Marc can follow to gather information about the learners from the production area. Your plan should address the following questions:
    - ▶ What information will he need to gather?
    - ▶ Where can he source this information?
    - ▶ What workplace policies and procedures would he need to refer to?
  - b. Develop a set of three or four questions that Marc could ask staff in the production area to confirm the individual needs and characteristics of the learners.
2. To satisfy the evidence requirements of *TAEDEL301 Provide work skill instruction* you must conduct a minimum of three training sessions involving demonstration and instruction of particular work skills for at least two individuals or small groups.

Through the learning activities of this learner guide you have the option of gathering the components of the first training session you will deliver.

Begin planning the delivery of your first training session by gathering information about your target learner/s, their learning and development needs, and the training location. Record this information, discuss it with your trainer and record their feedback.

**Click to complete Activity 1**

# 1B Ensure a safe learning environment

When planning a program of instruction and demonstration, you must consider safety and risk identification and management. Similarly, when conducting group instruction and demonstration of work skills, you must be aware of your own responsibilities in relation to safety and risk management, as well as those of other key personnel.

To ensure that you have a safe learning environment you will need to understand relevant policies and procedures, including hazard identification, risk assessment, reporting requirements, safe use of equipment and emergency procedures.

WHS procedures such as hazard identification and risk assessment and control must be included in the implementation of the learning program. These activities should occur before training and instruction commence.



## Work health and safety (WHS)

WHS is a key concern for workplace trainers and others providing work skill instruction. WHS is prescribed by legislation, regulations, codes of practice and other standards. There are also duty-of-care requirements placed on those involved in instruction and demonstration of work skills.

On 1 January 2012, the *Work Health and Safety Act 2011* (Cth) came into effect, replacing the *Occupational Health and Safety Act 1991* (Cth). This model legislation was developed by the Commonwealth government to harmonise work health and safety laws across Australia.

WHS legislation requires that employers provide safe and healthy working conditions for their employees. WHS legislation promotes health and safety in the workplace by reducing and controlling risks and hazards. Workplaces must comply with their relevant national, state or territory WHS legislation and have policies and procedures in place that comply with the legislation. While you may not need to be familiar with all the legislation, you do need to understand and follow organisational policies and procedures when developing and delivering a learning program.

## Duty of care

Workplace trainers have a duty of care to learners and others in the learning environment, regardless of where work skill instruction occurs.

A duty of care is a legal responsibility to ensure that whatever you do (or do not do) will not cause harm to any person. For example, before learners use a nail gun on a construction site, their employer and their workplace trainer have a duty of care to ensure that they are adequately trained in the use of this equipment. You must ensure that you and the learners to whom you are providing work skill instruction do not do anything that creates a risk to the health and safety of themselves or other people in the workplace or learning environment.

Learning program documentation should include specific WHS issues to be addressed in delivery; for example, whether personal protective equipment (PPE) is needed by the trainer/assessor and/or learners. Compliance with all WHS policies and procedures relevant to the learning environment is essential.

## Safe use and maintenance of equipment

Learning program documentation may provide information regarding access to and the safe use and maintenance of equipment, as well as how to report hazards and the site emergency procedures to be followed.

To help identify potential WHS issues you should reflect on:

- ▶ learner characteristics
- ▶ the purpose of the training, instruction and demonstration
- ▶ the materials and physical resources
- ▶ the context of the learning (the specific environment, training method and learning objectives).

You may need to access site WHS personnel, workplace documents or other resources for advice about specific WHS issues to be addressed in training, as well as for information about how to access copies of relevant legislation, regulations, codes of practice and standards or workplace policies.

## Responsibilities

WHS legislation prescribes various conditions for workplaces to provide for the safety of employees, contractors and visitors. When you are planning to deliver a learning program, confirm your duty-of-care responsibilities in relation to safety and risk/hazard identification and management. In all likelihood these responsibilities will extend to informing learners of their obligations.

Trainers need to make sure that the equipment to be used has been checked and is safely maintained, and that any hazards are reported and emergency procedures followed.

In the following example, a workplace supervisor and site WHS officer collaborate to confirm a safe learning environment for a workplace trainee.

**Example**

**Ensure a safe learning environment**

Owen is employed by the Metro Area Health Service as a workplace trainee. His traineeship involves various competency standards, including one that requires Owen to use correct manual-handling procedures, dispose of medical waste and carry out routine housekeeping using various cleaning products. Owen’s trainer organises with Owen’s manager and supervisor for learning and assessment in this unit to be conducted in the workplace.

Owen’s supervisor, Galena, meets with his trainer to confirm her understanding of the learning program and the performance standards that Owen needs to achieve.

Gareth, the trainer, seeks the advice of the hospital’s workplace health and safety officer to identify potential hazards and carry out a risk assessment for Owen’s work area. The health and safety officer points out that Owen will receive instruction on the correct use of PPE, emergency procedures and training in manual-handling and hazard identification procedures during his induction program.

## Activity 2

Inspect the learning environment for the first of your proposed training sessions and use a table similar to the following to record information about each of the key safety features that could affect the training session.

Safety feature	Training session considerations
Exit requirements	
Personal protective equipment (PPE)	
Safe access	
Safe use of equipment	

**Click to complete Activity 2**

# 1C Gather and check instruction and demonstration objectives

Clearly defined objectives benefit trainers and learners. An understanding of the learning objectives helps you to determine:

- ▶ the delivery technique to use
- ▶ the content of the program for instruction and demonstration
- ▶ the sequence of learning and development activities
- ▶ the tools that will be used to measure learner progress and outcomes.

On the learner side, clearly defined learning objectives serve as motivators and provide learners with benchmarks that they can use to self-assess their progress and achievements.

You must be able to access information about instruction and demonstration objectives, perhaps as they relate to competencies to be achieved or in relation to other skills. Discuss this information with your supervisor.



## Identify instruction and demonstration objectives

Learning objectives are written from the learner's perspective and define what a person should know, understand or be able to do after completing a learning program.

The person who is facilitating a learning program, training or skill instruction session should have information available to them about learning objectives, content and sequencing, and any learning resources and materials. The learning program's requirements for monitoring and evaluating outcomes may also be provided.

A workplace trainer or skill instructor may be required to develop a learning program for a work group or for individual employees. Similarly, if you are not provided with a delivery plan for a training method such as a demonstration, step-by-step instructions or coaching, you will most likely want to develop one. Ensure that you and the learners are clear about what you expect to achieve from the training.

## Learning program documentation

A learning program may consist of one document or a series of documents. The program should also record the LLN requirements of the learning and identify whether additional support or modifications to aspects of the learning program are required for some learners. WHS requirements should also be identified and recorded.

Learning program documentation may or may not prescribe the delivery strategies and methods, resources and learning materials that you are to use.

Learning program documentation sets out:

- ▶ the skill or task area that the learning need comes from; for example, customer service, computer operation
- ▶ the learning need
- ▶ the goals and expected outcomes
- ▶ the training solution, including the rationale for selecting the type of delivery, the credentials of the trainer or training organisation, the date, place, time and cost
- ▶ the resource requirements
- ▶ the details of assessment (if applicable)
- ▶ the responsibilities of learners
- ▶ the follow-up action required, if any.

## Content and delivery

The learning program itself may be based on training package competency standards or on other specifications. These specifications may be employment related or required by industry and may involve generic skills and technical skills.

In addition to learning objectives, a learning program may also provide you with other information about content and delivery requirements, as outlined in the following table.

### Overview

- ▶ What content the program will cover; for example, a list of topics and sub-topics, aligned with the learning objectives

### Delivery details

- ▶ How the learning sessions will be delivered; for example, classroom instruction, demonstration, coaching, practice in a simulated environment, formal group learning, online study

### Location

- ▶ Where the learning is to take place; for example, on the job, at a conference centre, in a simulated work environment

### Delivery sequence

- ▶ How many training sessions are involved, the duration of sessions, start and end dates for the entire program

### Training resources

- ▶ The learning resources, learning materials and activities required

### Assessment

- ▶ When and how the program will be assessed, and how learner outcomes are to be measured and recorded

## Generic skills

Generic skills are non-technical skills that contribute to a person's effective workplace participation. 'Employability skills' is another term used to refer to the range of skills that are relevant in most workplaces and industries. These can also be referred to as foundation skills. LLN skills, as mentioned earlier, are generic skills that enable people to participate effectively in their job.

Employees are expected to use their generic skills in a manner that reflects their experience, role, responsibilities and qualifications. A job description may identify the generic skills that the position-holder needs to perform their role competently. This information can be used as a basis for a skills audit to identify any gaps in employee skill levels. Learning objectives can then be developed and the necessary instruction, demonstration or coaching provided.

### Generic skills

- ▶ Communication
- ▶ Teamwork
- ▶ Problem-solving
- ▶ Initiative and enterprise
- ▶ Planning and organising
- ▶ Self-management
- ▶ Using technology

## Competencies to be achieved

A learning program may be aligned to an Australian Qualifications Framework (AQF) qualification or a training package unit of competency. Training package qualifications and competency standards have the advantage of having been developed as industry standards.

Each unit of competency describes the skills and knowledge that a competent person in the workplace should have in relation to a particular function or task. For example, the unit that you are undertaking, *TAEDEL301 Provide work skill instruction*, describes the skills and knowledge required to 'conduct individual and group instruction, demonstrate work skills and assess the success of training and one's own training performance, using existing learning resources in a safe and comfortable learning environment'.

A unit of competency provides guidelines for:

- ▶ the skills and knowledge that a learner must develop and demonstrate
- ▶ the contexts or work environments to which the unit may apply
- ▶ the performance or assessment requirements

## Technical skills: standard operating procedures

Technical skills relate to the specific knowledge and abilities required to perform tasks in a particular workplace or industry setting.

Workplace trainers may be required to deliver training to provide learners with the skills and knowledge required to implement specific standard operating procedures. These standard operating procedures may apply to routine tasks or to production processes and production-related tasks. It is common for standard operating procedures to have significant safety, quality and productivity implications.

Workplace trainers typically use instruction and demonstration to deliver standard operating procedure training. The learner then has an opportunity to practise implementing the procedure under supervision. Feedback and ongoing coaching or monitoring are provided at a level that reflects the complexity of the tasks involved in implementing the standard operating procedure.

## Technical skills: systems training

A learning program may be required because a new or modified organisational system has been introduced. A suitable learning program should take into account:

- ▶ the difference between what the employees are currently doing and what they will be doing
- ▶ what different users need to know.

The learning objective should relate to addressing the gap between past and new practices.

A range of learning and development strategies are appropriate for systems training. Small group sessions, demonstration and coaching are often used. If you will be working in a complex or high-risk system, training activities may need to be conducted in a simulated environment.

## Technical skills: WHS and induction training

All new employees must receive an induction into the organisation and their job role, particularly in relation to WHS. In certain environments where there is a significant technical, process, quality or safety imperative, a formal training program may be required. Again, parts (or all) of this training may be aligned to a qualification or unit of competency.

Every organisation is required to ensure that employees receive adequate training to enable them to work safely. Often this leads to learning programs being specifically orientated towards meeting WHS compliance.

WHS training can be delivered using a wide range of strategies. Group learning, online content or verbal instructions may be used to deliver the essential underpinning knowledge. Demonstration will be required for the practical and 'hands on' components of the learning program. It may be necessary for specialist resources and personnel to be available for this part of training.



The following example demonstrates how a workplace supervisor establishes learning objectives for instruction and demonstration sessions in competency-based training.

**Example****Gather and check instruction and demonstration objectives**

Following an eight-year stint as a receptionist with a real estate agent, Janelle has been absent from the paid workforce for five years. She enrolls in a business course with the goal of improving her technology and customer service skills. She knows that she will need these skills in her new job as a ward clerk in the accident and emergency department of a local hospital.

The administration manager, Saverio, is providing workplace training for Janelle to help her develop the generic and technical skills needed in her job. This training complements the formal business qualification Janelle is completing at the RTO.

Saverio develops a two-part learning program for Janelle based on her individual characteristics and needs. The program links Janelle's workplace experience with what she is learning in formal training. Saverio plans to coach Janelle in customer service and communication skills on the job. Saverio records the objectives for the skills coaching:

The learner will develop the skills and knowledge required to:

- ▶ deliver a service to patients and their families
- ▶ maintain medical records
- ▶ comply with relevant legislation and workplace policies and procedures.

The second part of the program involves demonstrating the correct use of the hospital's medical record system. Saverio arranges access to the hospital's learning and development intranet, which has a simulated medical records system used for training. His objective for the demonstration session is as follows:

At the end of training the learner will have the skills and knowledge required to access, create, maintain and retrieve individual medical records from the hospital's system in accordance with hospital policies and procedures.

## Activity 3

This task is a skills practice requiring you to write the learning objectives to deliver on-the-job instruction for part of a unit of competency.

1. Use the internet to access the National Register of VET at <http://training.gov.au>. Download a copy of the unit of competency *BSBWHS401A Implement and monitor WHS policies, procedures and programs to meet legislative requirements*.

Select a performance criterion that you could teach to a group of frontline managers using either instruction or demonstration. Write the learning objectives for the session. If you are studying in a group environment, compare and contrast the learning objective that you have written with those written by your colleagues. Record your findings.

2. Transfer your learning to the workplace by writing the learning objectives for the first of your proposed training sessions.

Continue planning and preparing for the first training session by reviewing any instructions or information you have been given, such as reviewing a learning program to identify the learning objectives.

Check the learning objectives with relevant parties and then record these. Keep your notes to refer to later when you examine delivery plans.

**Click to complete Activity 3**

# 1D Access and review learning resources and materials

At this point of the planning process, you should have had an opportunity to review the content requirements of a learning program or delivery plan. You should also have considered the delivery methods and techniques you will be using, the resource requirements and any special needs.

You should now be ready to select the learning resources and materials that you will use.

Learning materials include handouts and items sourced from the workplace that you may use as benchmarks, models or samples to demonstrate the required level of performance to learners.

Assessment materials will be required if learners are completing competency-based training or if your organisation is awarding recognition of successful completion of a learning program.

Resources may include the content, theory and instructions designed to build the learner's knowledge. They may also include learning activities or tasks that the learner will use to practise their skills, and resources designed to help you in your role as a trainer.

These resources and materials may need to be customised or contextualised to suit your learning objectives. Ask your supervisor to discuss your learning materials and resources. They may be able to recommend some items based on their experience or resource bank.

## Learning resources

A delivery plan should identify the learning resources to be used by learners and, if relevant, the trainer. The following table summarises the features of a range of learning resources that are suitable for use in individual or group learning situations.



<b>Learning resource</b>	<b>Description</b>	<b>Format and potential source</b>	<b>Example</b>
<b>Learner and user guides</b>	A text-based manual (supplemented with diagrams and photographs) covering the skills and knowledge required by the learner.	Developed in-house or available from external sources; distributed in print and electronic form.	A local council develops a series of learner guides that team leaders use to facilitate work skill instruction. Team members each have an individual learning plan that identifies the specific learning modules to be completed. Each module has a learner guide to develop the work skills relevant to council operations.
<b>Trainer and facilitator guides</b>	Trainer and facilitator guides can provide scaffolding for novice trainers, support experienced trainers by suggesting innovative and challenging training strategies and promote best practice. Sample documents, exemplars of completed forms, delivery plans and assessment advice may be included.  They may also suggest additional resources and materials, recommend reading and sequences for learning.	Various publishers distribute trainer and facilitator guides. Available in print, CD or online. Trainer and facilitator guides may also be developed in-house.	Aspire Learning Resources publishes trainer's and assessor's guides to accompany learner guides
<b>Example training programs</b>	Your workplace may have a resource bank of training programs that have been implemented. Each training program may include a course outline, learning objectives, delivery plan and assessment tools.  Check whether training programs are relevant to the training you have been asked to deliver and the characteristics of the learners. You may need to modify a program to suit your context.	May be printed or electronic documents, templates or forms.  Although likely to be in-house resources, some may be available commercially from an RTO or specialist consultancy.	Pebbles Aqua Centre has developed a training program that their swim instructors and coaches must use when providing instructions in swimming and pool safety. This is available as a PDF on the centre's intranet. Instructors and trainers must use an electronic template to record the dates, students' names and instruction provided.

Learning resource	Description	Format and potential source	Example
<b>Case studies</b>	<p>Case studies can be effective to demonstrate the application of skills and knowledge in a specific context. They are an excellent resource for consolidating learning because they show the skills and knowledge 'in action'.</p> <p>Case studies may also be used to assess whether learners are ready to transfer their skills and knowledge to a work environment.</p>	<p>You may develop case studies that suit your specific requirements.</p> <p>Case studies are also available in electronic and printed form, including in text books and journals.</p> <p>Check the copyright restrictions on published material that you wish to use before proceeding.</p>	<p>The various examples included in each topic of this learner guide are case studies.</p> <p>Case studies may include tasks or questions that the learner must complete.</p>
<b>Professional development materials</b>	<p>Professional development refers to a range of activities that extend beyond training, and may be used to improve a person's ability to perform in their vocational area.</p> <p>Professional development materials may include books, articles, presentations and recordings.</p>	<p>Professional development materials can be developed internally, or externally by a professional body or industry association.</p> <p>Professional development materials may also be collected on a webpage with links to various pieces of information or organisations.</p>	<p>Workers in an early childhood centre use their workplace Intranet to access a range of relevant professional development materials. The collection includes links to government agencies, expert bodies, journal articles, self-assessment checklists, advice about in-service training and online learning.</p>
<b>Assessment materials</b>	<p>Instructions to learners and assessors, with assessment activities and solutions.</p>	<p>Assessment materials may be developed internally or externally from sources such as: RTOs that offer use of assessment tools for a fee, private organisations that sell assessment tools, often in customisable electronic format publishers of learning and assessment resources.</p>	<p>Melanie recently began working at a small regional RTO. She is asked to assess a workplace trainee. Melanie uses the internet to source an assessment tool that she can customise to suit the trainee's context. Once the assessment materials have been quality reviewed, Melanie meets with the trainee's workplace supervisor to discuss collaborating in the assessment process.</p>

## Learning materials

Learning materials are sourced or prepared to support learners and give them the tools and information they can use to apply and extend their learning in a work environment. For example, in coaching an operator to improve her skills for dealing with customer complaints, a call centre team leader may give the learner a copy of the customer service script with some tips highlighted.

Learners will benefit from having materials sourced from the workplace; these may include technical specifications, workplace policies and standard operating procedures. Some learning resources will prompt learners to refer to other workplace documents. Whenever possible, make copies of these documents (or summaries of their key points) that you can distribute to learners during instruction. Be mindful of the LLN requirements of the training and the complexity of the workplace documents compared with the LLN skills of learners. You may decide to provide learning materials that reword the key points at a level that is appropriate for learners.

It is good practice to show learners examples of the outcomes that you expect them to be able to achieve following training. This helps them to understand what they are aiming to achieve. You can also use the samples to highlight where problems might occur and provide strategies for addressing them.

## Checklist to evaluate learning resources

The following checklist suggests criteria that can be used to evaluate the quality of learning resources and materials and their suitability for use in a specific training context.

Evaluation criteria	Yes	No	Comments
Does the resource clearly link to the training objectives and learning outcomes? How?			
Does the resource reflect industry characteristics through use of appropriate industry terminology, accurate content and case studies and examples?			
Are learning activities: <ul style="list-style-type: none"> <li>▶ accurate representations of workplace tasks and activities</li> <li>▶ sufficient and varied to support theory.</li> </ul>			
Does the resource identify and relate to its audience/target group? Is it suitable for this target group? Consider: <ul style="list-style-type: none"> <li>▶ the LLN levels of the learners</li> <li>▶ whether the resource uses plain English</li> <li>▶ if the resource has a clear structure and is practical and easy to use.</li> </ul>			

Evaluation criteria	Yes	No	Comments
Does the resource provide clear examples and explanations of complex ideas or terminology?			
Is the resource complete with no additional content or subject matter required?			
Are there clear instructions for trainers and learners?			
Does the resource provide a range of delivery and assessment methods to accommodate different learning systems, cultural contexts and training environments?			
What are the restrictions in regard to copying and distributing resource content?			

## Contextualising resources and materials

Regardless of the source of the materials, they should be reviewed to ensure their compatibility with learning program requirements. Unless the training being delivered is generic, some degree of customisation may be required to bring the materials to the standard appropriate to your training needs or organisational requirements. Once again, you may need to seek the assistance and support of a training professional to do this.

When contextualising learning materials, you must comply with copyright legislation, which may limit the way materials can be used. Note that even free material can have copyright obligations attached to it.

A review may identify the need to:

- ▶ change the content and language so it aligns with the characteristics of the learners; for example, LLN requirements or cultural backgrounds
- ▶ ensure that content and terminology, including reference to policies and procedures, align with those of the learners' employing organisation
- ▶ include system and process documents from the workplace.

Here is an example of how a trainer seeks assistance in checking the relevance of learning resources and materials to deliver mediation training.

## Example

### Access and review learning resources and materials

Midtown Community Housing Association organises housing for socially disadvantaged people. The Association identifies that the organisation's managers need mediation training. Edmund is given the task of coordinating learning resources and materials that can be used by workplace learners and their coaches.

Edmund obtains a copy of a learner guide written for a competency standard that includes performance criteria relevant to mediation. He thinks the content of the learner guide covers all of the information required in the learning program, but notes that the case studies are not relevant to the experience of the Association's employees.

Edmund decides to omit the case studies and the final assessment activity in the learner guide because the employees are not completing their learning as part of a qualification. With help from a training consultant, Edmund writes several new learning activities that are immediately relevant to the workplace of the target learners.

Edmund also organises for each of the learners to send him examples of when they have been called on to mediate between a client and other stakeholders. He uses these examples to prepare case studies that can be used in formal instruction sessions and for coaching purposes.

## Activity 4

You will need to use learning resources in the training session that you use to gather evidence for your evidence collection. You may need to follow the RTO's policies and procedures for sourcing and reviewing these resources for suitability and relevance. You may determine with the help of other stakeholders that the materials need to be contextualised or modified in some way to suit your learning context.

Identify, access and collect the learning resources and materials to be used in the first of your proposed training sessions.

Review them using the resource evaluation checklist in this section or alternatively, ask your trainer for a sample 'Resource evaluation checklist'. Aspire has included relevant templates in its *Trainer's and assessor's guide* for this unit.

To demonstrate that you are competent to conduct this review, you will need to include comments in the relevant section of the checklist rather than simple 'yes or no' responses.

[Click to complete Activity 4](#)

# 1E Organise equipment and physical resources

Identifying and organising access to the equipment and physical resources that are needed is an important step when planning instruction and demonstration sessions.

Learning programs that involve individual workplace instruction or coaching may require you to organise equipment and physical resources in that workplace. Time-management and organisation skills are required to ensure access to the resources at the appropriate time.

Workplace skill instruction for small groups can be more complicated. You may need to organise a venue, support staff, equipment and technology, stationery, catering and transport. If you are part of a team delivering instruction or demonstration you will have to communicate with the person coordinating the event and possibly other presenters to organise the resources for your session.

Be mindful that training conducted in the workplace involves a cost for the organisation. Learning resources, materials, time, allocating other staff to backfill roles while people participate in training sessions – it all adds up. If your training is going to create a return on this investment, such as improved work performance and higher productivity, you must organise the equipment and physical resources needed to deliver training effectively and efficiently.



## Identifying physical resource requirements

Refer to the learning program or delivery plan to identify the resources that are relevant for your training purpose. Resources include all those things that are needed by a trainer to deliver training, as well as those things needed by learners to complete the learning activities. Remember, there may be a cost for some or all items, which may mean you have to seek a more cost effective option.

Physical resources and equipment can include support resources such as training equipment and facilities; for example, training room, DVD player, whiteboard, audiovisual equipment, computers and stationery. The training may require equipment that is used in performing the job and is also needed to learn and practise skills; for example, computers, handtools or simulation software.

Learning resources and learning materials will also be an important consideration.

### Resource checklist

- ▶ Available when required
- ▶ In serviceable condition (spare parts available; e.g., a globe for a data projector)
- ▶ Within budget
- ▶ Licensing requirements met; permissions for use granted
- ▶ Culturally appropriate

## Organise physical resources

Key considerations for organising physical resources are shown here.

### Learning program and delivery plan overview

- ▶ Learning environment (work station, simulated workplace, training room, vehicle, etc.)
- ▶ Method (demonstration, coaching, explanation, group or paired work, practice activities)
- ▶ Learning objectives

### Learner characteristics

- ▶ Specialist help or resources required such as adapted technology equipment for a learner with special needs
- ▶ Timing of assessment (sequencing of training, length of sessions, availability)

### WHS considerations

- ▶ Hazard inspection
- ▶ PPE requirements
- ▶ Instruction on correct use of PPE
- ▶ Emergency instructions for the work area
- ▶ Location of emergency equipment

### Samples of completed work

- ▶ 'Finished product' to help learners to understand what they are aiming to produce
- ▶ Samples of the product at various stages of production (if applicable)

### Documents, templates, SOPs

- ▶ Workplace policies and procedures
- ▶ Forms, templates, style guides
- ▶ User guides, learner guides, learning materials
- ▶ Training manuals

### Technology and equipment

- ▶ Organise access to equipment
- ▶ Check that you are familiar with the equipment
- ▶ Confirm arrangements for maintenance, troubleshooting and installation
- ▶ Check equipment is in working order
- ▶ Perform safety check
- ▶ Organise any equipment or technology required for the learner's or trainer's special needs

### Human resources

- ▶ Arrange for the learner to be absent from usual work duties
- ▶ Inform other people required to participate in training session of schedule

## Training groups and individuals

The approach you take to organise equipment and physical resources for individual training may be different to that for group training. There are different resource and equipment demands in each instance. Often it is simpler to train individuals than it is to train groups, but this can come at a time and efficiency cost.

Providing work skill instruction to groups may require a more significant investment in resources. You may need to arrange a venue if you do not have a large enough room or workspace to accommodate the group. Off-site training offers the advantage of workers not being interrupted or easily distracted by workplace issues during training; however, you have the added responsibility for organising access to equipment and technology, work samples, copies of workplace policies and procedures, and perhaps remote access to a workplace intranet.

There are strategies you can use to organise access to equipment or physical resources for delivering group training.

## Facilities

Well before training is due to commence, ensure that the facilities chosen are adequate for the group size and characteristics. Check that your access is assured; for example, by making and confirming a booking well in advance.

WHS standards will need to be maintained. If the facilities are not usually used by your organisation, a risk assessment may be necessary to satisfy WHS policy and procedures; confirm the procedures for any risk assessments with your supervisor and follow them.

You may need to improvise or make adjustments in delivery to accommodate shortfalls in the facilities you have to work with.

### Preparation for training delivery

- ▶ Establish what time the building opens and where to obtain keys or security passes; confirm lock-up arrangements.
- ▶ Arrange for equipment and resources to be delivered to the venue.
- ▶ Make sure you have the name and phone number of the contact person at the venue who can answer questions and resolve problems on the day.
- ▶ Ensure suitable amenities are available at the venue; for example, drinking water.
- ▶ Determine arrangements for setting up the room; make sure there are sufficient chairs and tables.
- ▶ Arrange access for learners or trainers with special needs; for example, wheelchair access.
- ▶ Establish the availability of break-out rooms (if required).

## Technology and equipment

Technology and equipment resources should be listed on a delivery plan. These will vary depending on the nature of the training session and its location. From a safety and risk-management perspective, it is essential that you are trained in safely and correctly operating any machinery or equipment.

You also need to think about stationery and miscellaneous items, such as:

- ▶ flip charts and flip-chart paper
- ▶ whiteboard markers and erasers
- ▶ name tags.

### Key things to remember about technology and equipment

- ▶ Before commencing training, confirm availability and access to technology and equipment.
- ▶ Establish how soon before the training session you can check any equipment.
- ▶ Ensure that computers, whether for your use or for learners, have all relevant software installed and that access is authorised.
- ▶ Make sure you know who to contact if equipment fails.

### Example

#### Organise equipment and physical resources

Here is a pre-training checklist to be completed by a workplace supervisor instructing an apprentice in chainsaw operation.

##### Pre-training checklist

Apprentice: Joe Leonardi

Session title: Operate a chainsaw

Session date: 10 April

Session time: 10.00 am

Location: Site

Task	Check completed	Notes
<b>Learning materials</b>		
Instruction manual	<input type="checkbox"/>	
Site documents (including workplace procedures and work plan)	<input type="checkbox"/>	
Equipment start-up checklist	<input type="checkbox"/>	
Training log	<input type="checkbox"/>	
Chainsaw and component options	<input type="checkbox"/>	
Support tools	<input type="checkbox"/>	
Sharpening tools/equipment	<input type="checkbox"/>	
Fuel and resources to meet maintenance requirements	<input type="checkbox"/>	
Firefighting equipment (if in a wooded area)	<input type="checkbox"/>	
Appropriate signage	<input type="checkbox"/>	
<b>PPE:</b> Eye protection Safety helmet/head protection Hearing protection High-visibility vest Close fitting gloves (optional) Cut-resistant chaps/pants Safety boots Sunscreen	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
First-aid equipment	<input type="checkbox"/>	

## Activity 5

You are now ready to plan the equipment and physical resources that are required for the first training session that you will conduct.

This information will be incorporated in the session plan you develop for a later learning activity, so make sure you keep your notes.

Use whatever format is appropriate to record your resources and equipment plan. You may wish to record the information on a table similar to the following.

Resources plan		
Learner:		
Session title:		
Session date:		
Training method/s: (e.g., instruction, coaching, demonstration)		
Session time:		
Location:		
Resource	Source	Comment
Specialist support		
PPE		
Work samples		
Workplace policies		
Standard operating procedures		
Forms, templates, style guides		
Manufacturer's instruction manuals		
Safety data sheets		
User guides		
Trainer's manual		
Equipment		
Stationery		
Human resources		

[Click to complete Activity 5](#)

# 1F Notify learners about implementation of the learning program

You need to notify learners of the details of the learning program so they can make arrangements to participate. Tell learners about when, where and why they are undertaking learning.

Having full details about what is in store for them can be important to some learners, particularly those who are anxious about learning. Give learners as much information as possible about the learning program and the benefits of learning and development for themselves, the work group and the organisation.



## Inform learners about their learning program

The method used to inform learners about the details of their learning program should be reliable, cost effective and accessible for the learners. Workplace policies and procedures may include specific instructions about the preferred method of communicating with staff.

The details you need to include in your communication will vary to reflect the type of learning program that is being implemented and whether delivery is to be conducted in the learners' usual workplace or in another venue.

## Deal with contingencies

You may need to use more than one method of notification to reach all learners. For example, even if email is the primary form of communication in a workplace, not all participants may have email access nor may they be regular email users. If you are communicating with a group, arranging a prominently displayed notice can be effective.

You may need to make alternative arrangements for communicating with workers for whom English is a second language.

It may be appropriate to follow up the initial communication about the learning program with a confirmation letter or further email. You may need to explain the method that learners are to use to confirm whether or not they can attend. Your supervisor will be able to advise you on whether this is necessary.

If the training is compulsory but some workers are unable to attend, you will need to consult your supervisor.

## Location and time

Learners must be given sufficient notice of the location and time of the training. This is especially important when the learning program is to be delivered away from the workplace or outside normal working hours. Participants may need to organise transport or overcome other access issues; they may also need to make alternative domestic arrangements if the learning program is outside their normal working hours.

Precise information about the timing of a training event is also important. It is common to provide an arrival time and the time when training will commence. You may have seen these details on a meeting or learning program agenda; for example, 'Arrive at 8.50 am for a 9.00 am start'. Keep to time schedules; start on time and adjust breaks when necessary to maintain the schedule so that training finishes on time.

You should also inform learners of any additional activities that they will be required to complete outside working hours or training sessions; for example, learners may be required to complete assessment activities outside the workplace.

## Reasons for instruction or demonstration

Learning is generally most effective where participants 'buy in' to the learning program. This commitment occurs when learners understand the reasons for the learning program, and the benefits that will accrue to individuals, the work group and the organisation.

Learners may be apprehensive about the purpose of the learning program; for example, they may be worried that they may be judged on their performance during the program and this could be reported to their manager. Providing clear and unambiguous information about the purpose and benefits of the learning program will allay any fears or concerns that learners have. Explaining the reasons for instruction or demonstration also helps orient the learner to the program content. Learners then can prepare questions or organise their work to accommodate the learning.

The following example demonstrates how a work group use information about the purpose of the learning program to prepare for their participation.

### Example

#### **Notify learners about implementation of the learning program**

Will's staff have received advice that their work group will be undertaking a group learning program to develop the skills and knowledge required to service and maintain a new range of products that the company is launching.

The email announcing the learning program states that the new product range is an important part of the organisation's strategy to remain the market leader. This will help secure jobs for workers in this regional centre.

Will and his staff arrange to meet over lunch the day before the training. They discuss the purpose of the training, and agree to take a copy of the maintenance manual they have been using for other products with them so they can compare the products. They also decide that Will should raise the issues they have had with receiving technical support from several of the parts suppliers.

## Activity 6

Read the case study, then complete the task that follows.

### Case study

Tony is delivering training on site at DMQ, a mine near Mackay in Northern Queensland. The mine's management team explains to Tony at their initial meeting that they are keen to upgrade the current competencies of workers, particularly in regard to WHS and risk management.

Before travelling to Mackay, Tony begins the process of planning his training sessions by reviewing the information that learners have each provided on a personal profile form. Tony learns that three workers have disabilities that could affect their ability to complete written assessments; two workers are Indigenous Australians; two workers left school before completing Year 10; and one worker is reluctant to participate in the program.

Tony also realises that many of the learners can apply for recognition of prior learning for the WHS unit that is included in the qualification. He needs everyone to attend a one-day introductory session, where they can collect their learning materials and meet the other participants. Tony also organises a guest speaker who is a mine safety specialist.

He needs to send out information about the training to the learners. He knows that the course requires a big effort from them; however, he thinks that the outcomes for the learners and the company will be worth it.

Your task is to write the invitation for Tony's learners to attend the introductory session to the course. Your objective is to motivate learners to attend the session and engender a positive attitude to undertaking the course.

You may need to create details such as the venue, time and date.

[Click to complete Activity 6](#)

## Summary

1. Correctly identifying learning needs is crucial: if the identification is inadequate or wrong, you could provide ineffectual or inappropriate instruction and training. Ensure the information you collect is reliable, valid, unbiased and accurate.
2. Learner characteristics and needs can shape how training is structured and delivered, the length of training session/s, the resources required and the type of support that will be needed in the workplace following training.
3. The learning program that you implement must take into account the LLN demands of the workplace and its practices.
4. You should develop and implement strategies to address the diverse needs of individuals and ensure that all learners benefit from training and instruction.
5. As a workplace trainer, you have a duty of care to learners and all those who come into contact with the training environment.
6. Learning objectives are written from the learner's perspective and define what the learner should know, understand or be able to do as a result of the learning program.
7. Recording the goals and outcomes of a learning and development program ensures that you and the learners are clear about what you expect to achieve from the training.
8. Learning resources and materials include content, instructions and theory that are designed to build the learner's knowledge. They may also include learning activities or tasks that the learner may use to practise their skills.
9. You should refer to the learning program or delivery plan to identify the resources needed by a trainer to deliver training, as well the resources needed by learners to complete the learning activities.
10. The method used to inform learners about the details of their learning program should be reliable, cost-effective and accessible to all.



## Topic 2

In this topic you will learn how to:

- 2A Establish a comfortable and supportive learning environment**
- 2B Follow the learning program and delivery plan**
- 2C Brief learners on WHS procedures and requirements**
- 2D Use delivery techniques to structure, pace and enhance learning**
- 2E Apply coaching techniques**
- 2F Use communication skills to instruct and demonstrate**
- 2G Provide opportunities for practice**
- 2H Provide and discuss feedback on learner performance**

## Conduct instruction and demonstration

Various delivery techniques can be used for work skill instruction. When selecting an appropriate delivery technique, trainers have to consider the characteristics of the learners and the specific skills that they need to develop. Learning programs are more likely to be successful when they are supported by practical delivery plan and carried out in a comfortable and supportive learning environment.

Effective trainers not only provide information to learners, they build appropriate relationships and motivate and encourage learners to persist in their learning and achieve their objectives.

## 2A Establish a comfortable and supportive learning environment

Workplace trainers use their interpersonal skills to create an atmosphere in the learning environment that encourages learners to try new ways of doing things, ask questions that may expose gaps in their knowledge, and share their experience, ideas and concerns.

They also create a comfortable physical environment that facilitates learning.

### The learning environment

Learning delivery is most effective when the learners feel comfortable in the learning environment. Trainers need to pay attention to the physical conditions and the psychological atmosphere of the training environment.

You may have participated in a training session when there were issues with the physical environment, such as the venue being too hot, the chairs uncomfortable or the lighting poor. You most likely found that were you were distracted from the training experience by this physical discomfort. Be aware of this as a trainer, and be sure to check the environment where you will be conducting training ahead of time to confirm that it will be suitable.

The psychological atmosphere of the learning environment is equally important. Create an environment where learners feel respected, valued and not afraid to take risks in learning. Learners have to feel that it is 'safe' to expose what they do not know.

Learners can feel vulnerable in a learning environment; their skills and knowledge are on display, so it's not unusual for them to feel that their performance is being judged. Even when you are delivering one-on-one instruction or coaching, the learner may be concerned that asking questions or requesting additional practice activities will mean that you form a poor opinion of their abilities.

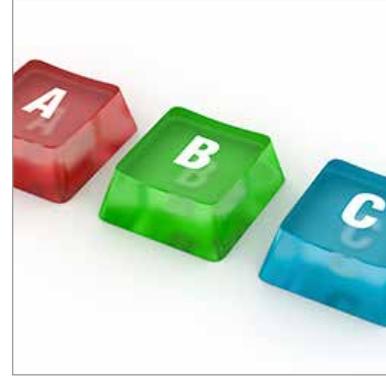
#### Establishing trust with the learner

- ▶ Take them at their word.
- ▶ Do what you say you will do.
- ▶ Give the learner freedom to practise and make mistakes without being ridiculed.
- ▶ Ensure that private and confidential information is not shared without the learner's permission.
- ▶ Explain your responsibilities and limitations so the learner knows what you can and cannot do during the learning program.

## Language, literacy and numeracy (LLN)

Learners who experience language, literacy or numeracy difficulties may feel vulnerable, inadequate and embarrassed about speaking up or participating in group learning. They may also try to conceal the fact that they have problems reading standard operating procedures or using learning materials.

Pitch your language, learning resources and materials and any numeric references appropriately for the learner's capacity. Aiming too high or too low may affect the learning outcome.



If necessary, speak to a qualified trainer or seek assistance from an LLN specialist to find out how to ensure any LLN issues are identified and appropriate support is arranged. Be sure to comply with legal requirements and workplace policies and procedures when doing so.

## Cultural differences

You can promote and encourage a supportive learning environment by using inclusive delivery techniques and practice activities so that all learners have an opportunity to participate effectively.

Ensure the learning environment is culturally inclusive:

- ▶ be sensitive to cultural needs when interacting with learners
- ▶ model behaviours and attitudes that promote inclusive work practices
- ▶ avoid stereotypes in your language and training materials.

Learners come to training with different backgrounds and experiences. They also bring with them varying skills and knowledge, and learn at different rates.

Trainers must comply with workplace access and equity policies so that all learners have an opportunity to participate fully in training and assessment activities.

### Acknowledge learners' personal differences

- ▶ Different work and life experiences
- ▶ Different ages and generational cohorts
- ▶ Different social, cultural, ethnic and religious backgrounds
- ▶ Different levels of existing knowledge or skills relating to the learning outcomes

## Skills for training

The success of workplace training depends on the effectiveness of the learner-trainer relationship. Delivering training uses many of the same skills as supervising a work team. You can use your interpersonal, communication and observation skills to foster relationships with learners.

Although your relationship with the learner is built on trust and may involve friendly exchanges, it must remain professional. Guidelines and boundaries for workplace relationships may be included in the organisation's policies and procedures.

Interpersonal skills are those skills used to interact with other people. Effective trainers need good interpersonal skills to establish a rapport with learners and engender a sense of trust and confidence in their ability to train.

### Strategies to engage, motivate and connect with learners

- ▶ Use a range of delivery techniques and examples to which they can relate.
- ▶ Explain the benefits of successful learning.
- ▶ Show learners how learning content is relevant to their job.
- ▶ Show you are interested in learners' opinions, experience and learning progress.
- ▶ Be mindful that everyone is different; show empathy and understanding in your approach.

## Monitor the group

Things to monitor include the following.

### Body language

Nonverbal cues are given through gestures and actions, facial expressions and eye contact, personal space and touch. These forms of nonverbal communication have an important place in the interactions between people.

Effective trainers are mindful of how they use body language, being aware of how they use nonverbal cues and ensuring that there is congruence between their body language and the verbal message they are giving.

It is also important to remember that what is considered appropriate body language in one culture might be inappropriate in others.

### Humour

Learning often involves trial and error. Learners may become frustrated or tired as they practise what they were shown in a demonstration or try to absorb complex information.

Humour is an important element in maintaining a positive, enjoyable learning environment. Appropriate humour can be used to engage learners and to encourage them to persist with learning. However, learners must never feel that they are being laughed at.

### Group dynamics

Effective group facilitation ensures that all members of a learning group have the same opportunity to participate. Observe group interactions and participation and involve quieter members of the group by asking them for ideas, making sure no-one is excluded.

Provide learning activities, guidance and practice tasks that encourage a positive group dynamic and respect for other learners.

## Use observation skills

Trainers need good observation skills to monitor learner progress and to identify problems or issues that need to be addressed in the learning environment.

As a workplace trainer, you will need to be able to identify when learners have barriers to learning, and when they are ready to take on new skills and tasks (coaches are well placed to do this). Learner progress becomes obvious when a learner asks for new or more challenging tasks, receives positive feedback from colleagues or supervisors and can consistently meet workplace specifications without assistance.

The following table highlights some observation skills that you should aim to develop as a workplace trainer.

Observation skill	What this skill means	What to look for
Assess learner communication and skills in interacting with others	<p>Communication skills are an essential employability skill required by all workers. Incorporate practice tasks that require learners to interact with others as part of the learning process.</p> <p>Observations about a person's communication can also help identify LLN issues.</p>	<p>The learner can be assessed while taking part in:</p> <ul style="list-style-type: none"> <li>▶ role-plays</li> <li>▶ group learning activities</li> <li>▶ skills practice in a simulated workplace</li> <li>▶ written communication samples</li> <li>▶ workplace coaching.</li> </ul>
Identify learner concerns or barriers to learning	<p>Learners may have barriers to learning (for example, LLN issues or cultural barriers) or other personal concerns.</p> <p>Be sensitive to the various cues from learners that may indicate they have an issue, barrier or concern that needs to be addressed.</p>	<p>The learner:</p> <ul style="list-style-type: none"> <li>▶ is reluctant to participate in group activities</li> <li>▶ does not satisfactorily complete learning activities</li> <li>▶ avoids training sessions</li> <li>▶ has conflict with other learners</li> <li>▶ demonstrates withdrawn body language, such as poor eye contact, fidgeting or not paying attention.</li> </ul>
Recognise learner readiness to take on new skills and tasks	<p>Coaches are particularly well-placed to gather evidence of how effectively learners are transferring their learning to their workplace.</p> <p>Learners who are able to meet performance measures are often ready to move on.</p>	<p>The learner:</p> <ul style="list-style-type: none"> <li>▶ meets performance standards</li> <li>▶ shows readiness for new or more challenging tasks</li> <li>▶ receives positive feedback from colleagues and supervisors</li> <li>▶ is observed helping less-skilled colleagues</li> <li>▶ completes learning activities and practice tasks.</li> </ul>

In the following example, Phong reflects on his own experiences as a new worker as he plans an induction session that will motivate and encourage new learners to commit to learning new skills.

**Example****Establish a comfortable and supportive learning environment**

Phong delivers training to the large group of casual retail assistants who have been employed by Total Sports in November in readiness for the Christmas season.

The profile of this group is that they:

- ▶ are usually young
- ▶ are generally at school or university
- ▶ usually have little or no work experience
- ▶ are keen to work hard and make a good impression.

The group receives induction training on the first morning. The afternoon is spent learning the basic skills required for customer service and maintaining store security; these skills are practised and observed over a period of time. As each new worker demonstrates that they are confidently applying their customer service skills in the store, they are taught the procedures for processing payments.

Phong arranges a peer coach for each learner from the experienced staff members. The peer coach gives instructions, demonstrates basic skills and observes and guides the learner as they assist customers. The peer coach refers any training issues that can't be addressed by on-the-job instruction to Phong.

Induction training is the first time that Phong meets the learners. He knows that he needs to develop a friendly relationship with each learner but also set professional boundaries. He wants them to respect him so they pay attention to what he tells them. He also wants them to feel welcome to approach him with questions and concerns.

Phong remembers his first Christmas in the store. He was nervous, and a bit frustrated that he was inside working while his friends were at the beach; however, he also wanted to succeed in his job and was ready to work hard.

Phong uses his personal experience and his knowledge of the learners to prepare an induction session that includes all of the necessary information. The delivery plan includes short group learning activities that are fun and designed to build relationships. Learners complete an activity with the person who will be their peer coach: it's a fun activity that helps build a sense of teamwork.

Phong uses the activities as an opportunity to talk to each learner about their personal circumstances and to try and gauge what will motivate them to perform.

## Activity 7

1. Prepare an activity that you can use as the icebreaker or introductory activity for a training session. You may develop the activity to use in the first training session that you intend to deliver for your assessment.

The purpose of the icebreaker is to initiate the learner–trainer relationship, use your interpersonal skills to engage the interest of the learner, and secure their commitment to learning. If your training session will be delivered to a group, use the icebreaker to develop rapport among the learners.

You can find useful ideas for introductory activities on many websites by searching ‘icebreaker’.

2. Deliver the icebreaker or introductory section in either an actual workplace or a role-play with one or more people in the role of learner. Ask your trainer/assessor or a colleague to record their observations of your performance.

Reflect on how you used your interpersonal skills during the session. Think about how these skills contributed to establishing a supportive learning environment. Record your reflections.

[Click to complete Activity 7](#)

## 2B Follow the learning program and delivery plan

Delivery plans show how delivery is aligned to the learning program. In a multi-session learning program, the plan for each session describes how that part of the learning program will be completed. In effect, a good delivery plan provides the 'what, when, where and how' of learning and skills practice; it details timings and resources; and takes into consideration the specific needs of individual learners.

A well-written delivery plan provides the trainer with a sequence for the delivery of each session.



### The learning program

A learning program documents the broad learning strategies that will be used to deliver training that addresses gaps in the skills and knowledge of workers and enhances their performance. Learning programs may be prepared for individual workers or groups. In some cases, the learning program may be designed for learners to obtain a training package qualification. If so, the learning program would also set out the methods that will be used to assess competence.

The people responsible for delivering work skills training should have access to the relevant learning program. From this, a delivery plan is developed that details the strategies, materials and resources to be used to develop the competence of workers to perform specific work skills. The learning objectives that you set for each training session should reflect the objectives set out in the learning program.

### Delivery plans

A delivery plan documents the structure of a single session of instruction. It shows the step-by-step training procedure trainers are to follow during the session, and describes how the content relates to the learning program. Clarify whether you are expected to develop delivery plans for your own use or whether these are to be provided to you. Your workplace may have a form or template you are expected to use, or you may need to develop a delivery plan in a format that suits your learners' characteristics and the training context.

Some organisations develop delivery plans that cover a series of sessions. Individual session plans are then prepared. In this learner guide, the term 'delivery plan' is used to refer to the step-by-step guide that the trainer follows to deliver training in one session to an individual or group.

There could be different delivery plans developed to support the learning program for different learners and contexts. For example, you may be delivering safety training in a face-to-face session while another team leader is delivering training to their team online.

### Components of a delivery plan for a single session of instruction

- ▶ Session name
- ▶ Delivery date and time
- ▶ Session duration
- ▶ Learning objectives or outcomes
- ▶ Content to be covered
- ▶ Number of learners and their support needs
- ▶ Profile of the learners
- ▶ How each learning outcome is going to be achieved (topics, activities)
- ▶ An indication of how long each topic (and sometimes each activity) will take
- ▶ Learning resources and materials needed for each topic or activity
- ▶ Formative assessment points (required for competency-based training)
- ▶ Workplace health and safety requirements, including emergency procedures
- ▶ Method/s for checking learner understanding

## Session timing

A delivery plan should apportion time to each content component that will be covered in the training session. The duration of each session will generally be determined by the complexity of the learning. You may be required to allocate times for the learning activities in the training session. If you do not feel confident allocating timing or sequencing content or learning activities, seek the assistance of a subject matter expert or an experienced trainer/assessor.

### Allocate time to all the activities that form part of the session

- ▶ Welcome and introductions (in group sessions)
- ▶ Get-to-know-you activities (icebreakers) or activities designed to energise the group
- ▶ Learning content and activities
- ▶ Skills practice
- ▶ Formative assessment activities (if applicable)
- ▶ Feedback
- ▶ Session recap
- ▶ Session evaluation

## Structure learning

The delivery plan outlines the sequence in which the learning content is to be delivered, segmenting and sequencing learning content by breaking it up into chunks. You can expect that the less-complex (lower-level) skills will be taught first and will act as a scaffold for more difficult or complex skill development. Scaffolding is fundamental to training and learning. Generally the trainer or an experienced peer provides the support and the prompts that allow a learner to build on their existing knowledge, proceeding from the known to the unknown.

How content is chunked depends in part on its complexity as well as on the learners' characteristics and their existing skills and knowledge. The more unfamiliar the learners are with the learning content, the more important it is to introduce the content in small segments. Time must be allowed for learners to understand and apply the content before building on the skills and knowledge with the next chunk.

## Sequence a delivery plan

If you are given a learning program without a delivery plan, you will have to undertake the task of sequencing. There are a number of ways to sequence learning content; you should determine which is the most suitable for the learning program and delivery plan. Many job functions and skill areas have a standard operating procedure that provides a logical framework for sequencing content.

Some work skills may not have written standards or procedures, or the relevant document may not provide you with sufficient detail. You will need to use your expert knowledge of the learning content and learner characteristics to plan the sequencing. One of the most common approaches is to proceed from the known to the unknown; computer software packages are often learnt this way. Some options for sequencing content are listed here.



### Step-by-step

- ▶ Step-by-step according to how a task is to be done. For example, you need to prepare the wood before you glue it together.

### Chronological order

- ▶ In the chronological order in which tasks are usually completed; for example, an induction process for a production worker may be structured based on the duties the worker needs to complete in order to work efficiently.

### Simple to complex

- ▶ Based on simple to complex sequencing; language or unfamiliar concepts are often learnt this way.

### Parts being taught first

- ▶ Some trade skills are delivered in this way according to importance or criticality; for example, a learning program on safe work practices would put the procedure for activating emergency procedures ahead of the procedures for reporting an incident.

## Select the delivery technique

Workplace trainers usually have the advantage of knowing their learners before training commences. They could be members of the trainer's work group or colleagues from another part of the organisation. This prior knowledge of the learners helps the trainer to select a delivery technique that is appropriate for the individual characteristics of each learner and the skills they need to develop. The delivery technique the trainer selects should provide a learning experience that motivates and engages learners, offering them the information needed and the opportunity to practise their developing skills.

The delivery plan will often include information about the delivery technique that is recommended for use.

## Contingency planning

Contingency planning involves thinking about what could go wrong and then planning how you will address any eventualities that occur.

During session breaks and at the end of each session, evaluate learning progress against delivery time lines. If your learners are ahead of schedule, you may need to devise additional practice activities or challenges for them. To catch up on lost time, you may need to cut less important material or devise a way of pulling together learning threads. If this is not possible, you may decide that it will be necessary to arrange an additional training session.

Observe learner behaviour and body language for signs of disengagement and modify your delivery accordingly.

Predicting problems, delays and other contingencies is difficult. Your contingency plan will record ideas for addressing likely risks. These actions could include rescheduling training, using resources available in another location or delivering the content in a different sequence.

### Things that could go wrong in a training session

- ▶ The learning materials did not arrive from the printer as agreed.
- ▶ A fire drill takes up valuable learning time.
- ▶ You have planned for the learner to shadow a more experienced worker and either person is absent from work on the arranged day.
- ▶ The equipment or technology that you planned to use breaks down.
- ▶ The learner is asked to return to their work station to attend to an urgent problem.
- ▶ Your observation of skills practice indicates that the learners did not understand your demonstration.

This example demonstrates how a workplace trainer uses a delivery plan to ensure he covers all of the necessary skills and knowledge and provides opportunities for skills practice in the time allowed.

## Example

### Prepare a delivery plan

Bullet Training Group offers on-site training for workers who need to be licensed to operate a scissor lift. There are WHS risks associated with the training and the trainers who deliver the on-site instruction and demonstration work closely with key workplace personnel, and WHS representatives, to prepare for the training.

Leo, the trainer delivering the workplace instruction, arranges to meet with the workplace WHS committee to conduct a risk assessment. He uses this as an opportunity to gather information about the employees who are participating in the training. Leo arranges this meeting several weeks ahead of the actual training day.

This gives him time to access and review relevant learning resources and to prepare contextualised learning materials for the site where training will be delivered. Leo finds that the contextualised learning materials assist the learners to apply the important WHS information in the training to their workplace. Using worksite terminology, images and other organisational detail in the learning materials helps learners link learning content to their workplace experience.

Leo prepares a delivery plan to take to the meeting. The delivery plan is an integral part of the training session. He uses it to pace delivery so he covers all of the content in the assigned time. Learners have to achieve the learning objectives by the end of the session as he cannot extend the training.

## Activity 8

Discuss with your trainer how you can integrate learning activities 8, 9 and 10 to deliver a work skills training session. This session can be used to practise for your final assessment in this unit, or to gather evidence that you have competently conducted an instruction or demonstration session for your evidence collection.

Source or prepare the delivery plan for the work skills training session. (You may follow a delivery plan prepared for you, or you may prepare your own.)

Review the plan carefully to ensure it covers the content, learning resources and materials, sequencing and skills practice required to meet the learning objectives. Ensure it allows time for WHS instructions.

[Click to complete Activity 8](#)

# 2C Brief learners on WHS procedures and requirements

It is essential to brief learners on any WHS procedures and requirements before and during training. You must know and understand the WHS requirements for the task you are instructing or demonstrating. You have duty-of-care obligations to everyone in the learning environment and associated with the learning. Identify and apply safety procedures, and read and interpret the learning program to identify any equipment, technology or PPE that learners will need access to during instruction and demonstration.



You must identify the sources of WHS information and advice you can refer to when planning and delivering work skill training. It is important you understand the WHS procedures and requirements that apply to the training. Seek clarification of any areas about which you are unsure.

Plan carefully the strategies that you will use to brief learners on any WHS procedures and requirements before and during training to ensure their health and safety.

## Brief learners

One duty-of-care responsibility is to brief learners on all WHS procedures and requirements, including explaining the safe work practices that apply to the learning environment and the application of work skills. Explain in simple terms so all learners understand and can apply the information to their situation. Plan the WHS information that you will give to learners, considering what, when, how and who as indicated below.

<b>What</b>
What information you will give them (this will vary to suit the needs of the learners, and the purpose and location of training)
<b>When</b>
When you will give the information (before, during and after training)
<b>How</b>
How you will give the information (the communication method you will use)
<b>Who</b>
Who needs to receive WHS information (learners, other people in the learning or work environment)

## Information for briefing sessions

Workplace trainers and assessors must use their expertise in training, the subject area being taught, and their knowledge of the work environment and practices to decide when and how to brief learners on WHS procedures and requirements.

It is important to 'chunk' information and consider how it will be sequenced in the briefing session. Identify whether you need to provide support materials such as diagrams or copies of standard operating procedures. Pay particular attention to the LLN proficiency of the learners, their education level, and other characteristics and needs. Pitch the content at a level that will be understood and assimilated by learners while still maintaining the correct meaning and intent.

All workplaces have policies and procedures to deal with inappropriate behaviour, including any behaviour or action that breaches WHS policy or procedure. You will need to follow correct procedure and deal effectively and decisively with inappropriate behaviour so you meet your legal and ethical obligations as a workplace trainer.

### Information for a WHS briefing session for learners

- ▶ Hazard identification procedures
- ▶ Reporting hazards and incidents; protocols to follow if a safety breach occurs
- ▶ Emergency procedures
- ▶ Start-up/shut-down and routine maintenance procedures for plant and equipment
- ▶ Safe work practices, including an explanation of specific hazards and control measures that are relevant to the tasks that they will be learning and practising during the training
- ▶ Correct use of PPE
- ▶ Manual-handling procedures
- ▶ Workplace policies on bullying, harassment and discrimination
- ▶ Waste disposal procedures
- ▶ Accessing WHS policies and procedures, WHS forms and reports (including incident reports)
- ▶ Sources of WHS information

## Site-specific safety rules

Organisations develop and implement safety rules that are aligned to their WHS policies and procedures and suit their industry, operation and workforce characteristics.

Identify whether there are specific site rules that apply to the work skills included in the learning program. Obtain a copy of any such rules and confirm that you and the learners understand what is required.

It will be necessary to conduct a safety briefing with learners to ensure they fully understand their obligations to meet site safety rules.

### Site safety rules

- ▶ How to interpret safety signs and information
- ▶ How to operate equipment safely
- ▶ Fire and emergency procedures
- ▶ First-aid procedures
- ▶ How to report health and safety incidents
- ▶ How to handle hazardous substances
- ▶ Manual handling
- ▶ Working at heights
- ▶ Working in confined spaces
- ▶ Housekeeping

## Incident reporting

The organisation where work skill instruction occurs will require all employees, trainers and learners to report any hazards, near-miss incidents and injuries that occur in the workplace. This usually involves completing an incident report form and submitting it to the relevant workplace supervisor or WHS personnel as soon as possible.

Follow organisational policy and procedure when reporting incidents or near misses. When an incident occurs, obtain and complete an incident report as soon as practicable.

Delivery plans must be designed to incorporate time for briefing learners on any WHS procedures and requirements before and during training.

This example demonstrates how a workplace trainer briefs an apprentice at the beginning of his on-site training session.

### Example

#### Brief learners on WHS procedures and requirements

Levi is training Harley, who is an apprentice in the construction industry. Levi is aware that Harley has limited experience in using power tools on the work site. As a young worker, Harley also faces a higher risk of being involved in a WHS issue because he lacks experience and is not fully familiar with workplace procedures.

Harley needs to learn the correct use of a power saw so he can start preparing framing sections.

Levi meets with Harley's trainer, the safety officer and the union representative to discuss aspects of the on-site training and equipment use.

The group agrees that using power tools presents a risk. Levi must ensure that the area in which the instruction takes place is clear of any hazards. He must also check the saw prior to use and confirm that Harley is using appropriate PPE during the training. The delivery plan Levi is following includes time for giving Harley crucial WHS information, including:

- ▶ emergency procedures
- ▶ identifying hazards
- ▶ controlling risks
- ▶ using PPE
- ▶ site-specific safety rules
- ▶ safe use of equipment (including site preparation and start-up procedures).

During the part of the instruction session where Harley is practising the necessary skills, the power saw grabs, almost causing Harley a serious injury. Levi immediately disconnects power to the saw and coordinates administration of first aid to a cut on Harley's leg.

Once the immediate incident is addressed, Levi completes an incident report. He believes that although the issue that arose was a risk he had considered in his risk assessment, he had done all he could to ensure that Harley was briefed on the dangers of using the power saw.

## Activity 9

Brief a learner on the WHS procedures and requirements of a specific work skill. You may deliver this training to an individual or to a group of learners.

Alternatively, you may wish to practise giving WHS instructions to learners on a specific work skill before undertaking assessment activities. Use the example of Levi in this section to practise giving WHS instructions to learners during work skills training.

Organise for a trainer/assessor or other appropriate person (such as your manager, a WHS representative or other person with expertise) to observe you giving this instruction. You could record the instruction session so they may view it later.

The information that you include in this session will vary to reflect the specific work skill that is being taught. Consider the following key WHS issues in the learning and work environment:

- ▶ roles and responsibilities of key personnel for WHS
- ▶ responsibilities of learners
- ▶ relevant WHS policies and procedures, including hazard identification, risk assessment, incident reporting, safe start-up of equipment, safe use of equipment and emergency procedures
- ▶ risk controls for the specific work skill.

**Click to complete Activity 9**

# 2D Use delivery techniques to structure, pace and enhance learning

Effective trainers use their knowledge of how adults learn and their understanding of learners and groups to select delivery techniques that align to the individual characteristics and needs of learners.

A range of techniques can be used to deliver workplace training, each with its own advantages and merits. In many cases, trainers will elect to use different delivery techniques at different stages of a learning program. The techniques chosen must contribute to a well-structured and suitably paced delivery that achieves the learning objectives established in the learning program or delivery plan.



## Consider how people learn

Effective workplace trainers interpret the information that they have about learners and the skills that they need to develop to choose delivery techniques that will keep learners interested, actively involved and encouraged to persist in developing their skills.

When selecting delivery techniques, be mindful of the principles of adult learning, particularly that many adults are self-directed learners. Remember that adult learners are diverse in their work and life experiences, cultural backgrounds, previous education and training, and goals, and that this rich experience needs to be considered in your planning.

## Select an appropriate technique

Providing work skill instruction involves using more than one technique. It is unwise to deliver content in only one way. Often, it is effective to cover the content more than once, using a different technique each time. To train in safe power saw use, the trainer may combine demonstration with instruction and explanation, an audiovisual presentation of power saws being used correctly and incorrectly, supported by a training manual or learner guide. The combination of delivery techniques keeps learners interested and reinforces learning and transferability of the skills to the workplace.

There are a number of delivery techniques you can use. What really counts is providing learners with every opportunity to develop the skills and knowledge that are the focus for the learning session. Adapt or modify delivery techniques to meet learner characteristics and the training environment, and also to ensure that learning outcomes are met.

## Demonstration the technique

Demonstration shows the learner how a procedure or function is carried out on the job. This might be done informally in a one-on-one situation at the point of training; for example, at a particular machine, in a training room or during the actual production process. The training can also be done in a more formal presentation to small groups. Demonstration provides opportunities for learners to ask questions and use the required skills, and for the trainer to provide constructive feedback to improve the performance or behaviour.

Demonstration is useful when learners are developing a new skill; for example, how to use computer software or tools. It is important to demonstrate the correct way of performing a task and to explain why the task is done that way. A process you can use to demonstrate a task is shown below.

### Providing a demonstration

- 1

**Explain**

Explain to learners what the demonstration will show.
- 2

**Demonstrate**

Demonstrate the end-to-end task.
- 3

**Break into smaller parts**

Break the task up into smaller tasks.
- 4

**Demonstrate**

Demonstrate the first section of task.
- 5

**Allow questions**

Allow learners to ask clarifying questions.
- 6

**Answer questions**

Respond to questions.
- 7

**Practise the task**

Ask learners to practise the first section.
- 8

**Give assistance**

Assist individual learners as required.
- 9

**Repeat task demonstration again**

Demonstrate the first section again.
- 10

**Demonstrate the next section**

Demonstrate the next section, explaining the link between the first and second sections.

**11****Repeat process**

Repeat from step 5.

**12****Review all steps**

When all steps have been demonstrated and practised, demonstrate the entire task end-to-end again.

## Coaching technique

Coaching works well for learners who require more time to query the content of the training, and is effective for learning work-specific tasks that are better applied to one-on-one situations. Coaching is the method commonly chosen for traineeships and apprenticeships. The relationship boundaries and responsibilities are usually drafted in a training contract.

Coaching is effective when used in combination with other techniques. Information can be explained to the learner and a demonstration with skills practice may follow. Coaching is used to support the learner as they transfer their skills to the workplace.

### Points to bear in mind

- ▶ The coach needs to be available to the learner.
- ▶ The coach needs to practise giving constructive advice.
- ▶ Coaching should not interfere with the levels of service provided to customers.
- ▶ Coaches should be aware that some learners may feel uncomfortable being coached in front of their peers.
- ▶ It is important for the coach to avoid completing the learner's work for them.

## Opportunities to practise skills and solve problems

Discuss the various opportunities for practice that will be provided. Encourage learners to practise in different contexts, such as at different work stations or locations, or with slightly different equipment to develop a broader and deeper understanding of each task. When supervising practice, use your professional judgment about the extent of supervision required. Practising skills helps learners use what they learn when they return to the workplace.

Use the following strategies to facilitate skills practice:

- ▶ Be patient.
- ▶ Expect mistakes.
- ▶ Guide and encourage.
- ▶ Ask questions to encourage learners to apply their knowledge.
- ▶ Acknowledge effort and give praise when appropriate.
- ▶ Help learners to find sources of information to deal with problems or issues rather than answering questions for them.
- ▶ Gradually withdraw the amount and type of supervision as learners' competence develops.
- ▶ Give feedback that includes suggestions on how to improve performance.

## Question-and-answer technique

In a facilitated group discussion, the trainer/facilitator leads the discussion by prompting, encouraging and directing the participants to address the topic at hand. Use the following structure as a guide.

1. Pose a question.
2. Ask for volunteers to respond to the question.
3. Document key points on a flip-chart or similar.
4. Thank all participants for their responses and summarise the discussion or outcomes.

### Question-and-answer technique pointers

- ▶ Check for understanding.
- ▶ Involve the learner in decision-making.
- ▶ Obtain information and feedback.
- ▶ Ask open questions.
- ▶ Pose a hypothetical question to a learner to find out how they would go about dealing with a particular issue or contingency.
- ▶ Be patient and wait for an answer.
- ▶ If a learner doesn't know the answer, help them to think of strategies for finding the information that they need.
- ▶ Ensure that the questions you ask are pitched at the right level.
- ▶ Allow a reasonable time to answer before offering clues or prompts.

## Explanation technique

Using this technique, the entire content of the learning is presented to the learner in its final form; perhaps through learning from a learner guide, listening to a lecture or watching a demonstration supported by explanation. Explanation is often an effective method for delivering the knowledge that underpins learning.

Consider using audiovisual equipment to reinforce the content of an instruction session. Audiovisual presentations can be used to show a skill in action in a range of work settings.

### Explanation technique pointers

- ▶ Acknowledge what the learner already knows.
- ▶ Eliminate or minimise distractions in the learning environment.
- ▶ Explain the big picture.
- ▶ Explain why the job is done this way.
- ▶ Use clear and simple language.
- ▶ Have the learner restate the explanation they have been given so you can check their understanding.

## Group or pair work technique

In this technique, groups or pairs of learners share ideas and practise communication and interpersonal skills and team-building.

To effectively deliver work skill instruction using groups or pairs of learners a trainer needs to be able to:

- ▶ manage group dynamics
- ▶ address specific needs of the individuals that make up the group or partnership
- ▶ identify and interpret behaviour that puts others at risk
- ▶ facilitate group discussion and interaction.



## Identify group characteristics

Identifying group characteristics is just as important as identifying individual characteristics, because you must understand the needs of both to be able to provide effective learning.

Before introducing a group-based learning activity, establish learners' prior experience of learning in pairs or groups. Explain the purpose and advantages of group work, emphasising teamwork and problem-solving. Make sure the assigned task provides a meaningful role for all learners. Monitor group work to ensure learners collaborate and all group members participate actively. Think carefully about the size of the group; groups of three to five people are usually more effective. Finally, be prepared to assist if there is conflict in the group or where there is not equal distribution of responsibility.

One of the most important skills you can develop is the ability to observe and monitor learner progress and make adjustments to your delivery based on the way training sessions evolve. You will need to continually reassess the way you do things and adjust your delivery technique to suit group and individual needs.

### Example

#### **Use delivery techniques to structure, pace and enhance learning**

Alicia is a team leader in a contact centre. For two years she has honed her delivery techniques for training new team members.

In the first five days of employment, new contact centre staff undertake formal group training as part of their learning program. The group training is delivered by qualified trainers. The purpose of the training is to develop learner knowledge of the company's products and services and the customised software used for processing orders.

Once the trainer confirms that each learner has the basic skills and underpinning knowledge required to handle customer calls, the new team members are allocated to a contact centre team.

Alicia uses a series of delivery plans that she has been continuously improving to instruct a new team member. Her goal is that within three weeks each person will develop the specific work skills needed to successfully handle customer calls with minimal supervision.

Alicia structures her delivery plans to pace the amount of new information and skills that learners are required to absorb and practise. Her areas of instruction are:

- ▶ using customised software (building on the information from group training; learners need to be able to use the software to handle 'live' calls)
- ▶ selling skills
- ▶ customer service
- ▶ call management
- ▶ safe work practices
- ▶ teamwork and interpersonal skills.

Today Alicia's delivery plans involve her providing instruction to her two new team members each morning in the break-out room for an hour, followed by practical application of skills the for rest of the day.

1. Alicia explains the step-by-step standard operating procedure for a specific work skill.
2. She then takes the two learners to training work stations and demonstrates the skill while explaining how she is following the standard operating procedure. She ensures that she highlights the WHS procedures she is following as she works.
3. After answering the learners' questions, she has them explain the process to her to check their understanding.
4. Alicia supervises the learners while they complete various practice tasks from a learning materials folder. She reminds the learners to use the learner manual given to them in group training as a resource.
5. Once she feels confident that the learners are progressing with the practice tasks, she leaves them to complete some practice work activities that require them to work as a pair. This helps to build their communication and teamwork skills and also encourages them to share their learning.
6. During the morning break, Alicia speaks to the learners about their experience since joining the company, offering to follow up any issues or questions they have about their induction period. During this time she usually exchanges some personal information with the learners to establish a friendly and professional relationship with the staff she supervises.

After the break, Alicia and the learners return to the training work stations. The learners receive a number of customer calls that she monitors. Her coaching helps the learners to enter data; she offers suggestions, answers questions and gives constructive feedback.

## Activity 10

In this topic, you have examined several delivery techniques that are appropriate for work skill instruction. In this learning activity, you will practise at least two of these techniques by applying them in a training session delivered either in your workplace or in a simulated work environment.

The purpose of your training session is to instruct a learner to use a new skill that is relevant to their current job.

Use the delivery plan you have been provided with or develop one of your own. Build at least two delivery techniques into the plan, and use at least one item of audiovisual or technical equipment in your session. Explain in your plan which principles of learning you will embed in your approach to the training session and how you will do this.

A third-party report or observation checklist must be completed by an observer. The person who is reporting on your performance must comment specifically on the following:

- ▶ instruction on WHS procedures relevant to the work skill
- ▶ pace of delivery (learning objectives achieved in the designated time)
- ▶ confident use of audiovisual or technical equipment
- ▶ methods you used to interpret and respond to any learner behaviour that could have put people at risk
- ▶ the various skills (communication, interpersonal, time management, observation) you used to enhance delivery
- ▶ whether you followed the delivery plan
- ▶ contribution of the skills practice to learning.

Reflect on the effectiveness of your delivery and record the details of your reflection. Include your reflections, the customised delivery plan, and the observation checklist or report in your assessment portfolio.

[Click to complete Activity 10](#)

# 2E Apply coaching techniques

Coaching is the process of one person helping another to develop their skills and improve their performance. The coach may be a workplace supervisor or experienced colleague with expertise in a specific field. Successful coaching requires good communication and interpersonal skills. The coach also needs to be motivated and committed to helping other workers to develop their competence.

Successful coaching relies on the coach having the skills to share their experience with learners as part of their development of work skills.



## Skills for coaching

Coaching is most effective when it is part of a structured or formal learning program. Often coaching is used in combination with other forms of training and it can be used at any stage of instruction. Consideration should be given to deciding which work skills are best developed by working with a coach. Once the learner begins the process of transferring their learning to the workplace, a coach can monitor their work and continue to shape their skills development. The learning program may require the coach to integrate learning tasks into the work activities that are part of the learner's daily routine.

Coaching is more likely to be successful when there is a good fit between the coach and the learner. Both will need to commit to achieving the learning objectives and be prepared to participate constructively in the coaching relationship.

### Attributes of the successful coach

- ▶ Experience and expertise in the work skills
- ▶ Good communication and interpersonal skills
- ▶ Patience
- ▶ A commitment to helping others achieve their goals
- ▶ The ability to explain complicated work instructions using plain English
- ▶ The ability to give constructive feedback
- ▶ The ability to act as a motivator and role-model to the learner
- ▶ A positive attitude to culturally inclusive work practices
- ▶ A commitment to continuous improvement and innovation

## Awareness of adult learning

Coaches will also benefit from having an awareness of the principles of adult learning, and an understanding of how to identify individual learning needs. They can then select the appropriate technique for fostering learning. The key to achieving learning objectives through coaching is developing a good relationship between the coach and the learner.

### Factors that strengthen the coach–learner relationship

- ▶ Trust
- ▶ Acknowledging and praising effort
- ▶ Being committed to the learner’s development
- ▶ Open communication
- ▶ Respect
- ▶ Setting realistic goals

## The coaching process

The process used to coach learners will reflect the organisation’s policies and procedures.

Constructive feedback is as important in coaching as in any other training method. Coaching offers the benefit of the learner receiving immediate feedback as they perform work activities.

You may be required to maintain a log of coaching activities. For example, workplace supervisors of trainees and apprentices must record the training activities undertaken in the workplace. Confirm organisational requirements for coaches with your relevant training or human resources personnel.

### Steps involved in effective coaching

- ▶ Give the learner the big picture. Describe the purpose of the work activity.
- ▶ Where appropriate, display a finished work sample.
- ▶ Use clear and simple language to explain each step in the activity.
- ▶ Explain why the activity is performed this way. Highlight safety information.
- ▶ Demonstrate the activity.
- ▶ Provide opportunities for practice.
- ▶ Ask questions to confirm the learner’s understanding.
- ▶ Encourage and correct or shape the learner’s performance.
- ▶ Monitor the learner’s performance.
- ▶ Give constructive feedback.

## Coach to assist learning

Work skill instruction can be reinforced with effective coaching. Learners who have completed off-the-job training may find it difficult to apply the skills and knowledge they have been taught to their work activities. A coach can smooth this transition.

During coaching, the learner has an opportunity to receive one-on-one support to develop work skills. A coach can observe them and give immediate feedback. A coach can also monitor learner work output to identify errors and to provide remedial skills training where necessary.

In some cases, learners need ongoing and ready access to a support person in the workplace as they undertake skill development, particularly if they are involved in technical, complicated or high-risk activities. Learners in customer service roles also benefit from ongoing coaching.

Immediate feedback from a coach shapes a person's skills and knowledge when this is needed.

## On-the-job instruction and 'buddy' systems

Some workplaces assign an experienced co-worker as a 'buddy' to assist with orientation and skill development and reinforcement.

New workers may find their buddy a useful resource. Working with a buddy can be less intimidating than being coached by a supervisor. A learner is more likely to ask basic questions of the buddy and may be less concerned with making mistakes as they learn new skills.

It is important that the person overseeing the implementation of the new worker's learning program oversees the buddy system to monitor the learner's progress.

### Features of 'buddy' support

- ▶ Buddies provide introductions, thus easing the way for a new worker to build social and professional networks.
- ▶ Buddies help the learner to access resources and workplace information.
- ▶ Buddies are a cultural guide in that they explain how things are done in the workplace.

## Relationships targeting enhanced performance

Coaching can be an effective method for enhancing the performance of workers who have completed other forms of learning and development and are performing their role competently.

Coordinating a coaching relationship between a competent worker and a high-achieving colleague offers potential benefits for both parties. The competent worker may be exposed to new ways of thinking, innovative work practices, professional development ideas and techniques that will help them to complete tasks more accurately or efficiently. The coach, meanwhile, can play an important role in motivating the worker to apply their learning.

## Short-term and one-to-one arrangements

There will be occasions when gaps are identified in a worker's performance that can be addressed without developing a formal learning program. In these situations it is appropriate to assign a coach to observe the learner in the workplace and give targeted guidance and support to address a specific skill, knowledge or performance issue. The coach can continue to monitor the worker's performance, providing additional support where necessary or referring the worker to a trainer if required.

Working one-on-one gives a coach or trainer an opportunity to provide instruction at a pace and level that are appropriate to the learner. This technique is particularly appropriate if there are LLN issues or if the work skill involves a high WHS risk, complex procedures or sophisticated equipment or technology. The trainer is able to carefully monitor the learner during skills practice.

The following example demonstrates how a workplace supervisor uses coaching to support external training.

## Example

### Apply coaching techniques

Rhys is completing a Certificate III Agriculture at his local training academy. He will do most of his learning in the workplace, where he is employed as a trainee.

Rhys is required to complete a unit of competency that involves using farm chemicals. Rhys's trainer organises for his workplace supervisor, Keiko, to coach him as he works through the learner guide, completes activities and practises his skills as part of his usual daily work routine.

Keiko completes the training log to record Rhys's learning and performance in the workplace. She meets with Rhys's trainer and confirms her understanding of the instructions for a series of activities Rhys has to complete in the workplace. In agriculture units of competency, WHS is an integral part of every work function. Keiko supervises Rhys's workplace training to ensure he not only performs the task as required, but also uses appropriate safety equipment and clothing and is capable of identifying hazards.

Workplace WHS policies and procedures must be complied with during learning and skills practice. Keiko and the trainer conduct a risk assessment and ensure Rhys receives one-on-one instruction in the correct use of PPE.

Keiko and Rhys set aside time each week to review the activities he completes. Keiko supports Rhys by suggesting he refer to workplace policies and procedures, helping him to find references such as journals and internet sites, and checking that he fully completes each activity.

## Activity 11

In this topic, you looked at the various methods that can be used to coach learners in the workplace. The method that is used should reflect the type of work skill that is being taught and the period of time over which coaching is to occur.

In this task, you will plan and provide workplace coaching to assist a learner in learning a work skill. You may use any of the coaching methods/formats described in this topic.

- ▶ Prepare a delivery plan for the session.
- ▶ Arrange access to a learner, and arrange for your trainer/assessor, manager or an appropriate colleague to observe your performance and give you feedback.
- ▶ Conduct the session.

Critically reflect on your performance in the coaching session to identify areas for improvement and track your personal skill development. Consider how you would recognise learner readiness to take on new skills and tasks following the coaching. Use your journal to record your reflections.

[Click to complete Activity 11](#)

## 2F Use communication skills to instruct and demonstrate

Effective instruction and demonstration can only occur when the person delivering training is able to use appropriate communication skills. When delivering training you are sharing information, so you will need to be able to explain procedures clearly and at a level that learners understand. Effective questioning techniques and active listening are essential to identify information that requires clarification or further explanation and to confirm learner understanding. Nonverbal communication skills can also play a role in how effectively you are able to convey information to learners.

Body language, particularly eye contact, and questioning are key parts of communication in many Western cultures; be aware, however, that the same does not apply to all other cultures. Some cultures regard direct eye contact as rude or intimidating.

Likewise, some cultures may not respond well to direct questioning. Isolating an individual in the group during instruction or a demonstration can be perceived as rude or intimidating and may lead to feelings of shame and possible withdrawal from participation in the group.

### Apply a communication process

Your goal when providing work skill instruction is to use language at a level that can be understood and assimilated by the learner. The content may challenge the learner, requiring them to follow detailed procedures or learn new and task- or workplace-specific terminology.

To 'scaffold' learners through the learning process, begin by using language and terminology with which they are familiar, and frame new concepts in a way that is meaningful to them by relating concepts to their work or life experiences. Provide a meaningful explanation of all knowledge, skills and concepts.

Allow for questions, but tell learners at the beginning of the instruction or demonstration when it will be appropriate for them to ask questions. In some cases it may be preferable to have learners wait until instruction or demonstration is complete. Answer questions before proceeding to the next procedure or demonstration.

Be mindful that you are a role model to learners. Use language that is non-discriminatory and avoid cultural and gender stereotypes. Demonstrate a positive regard for cultural inclusivity in the examples and case studies that you use to support your instructions.

It is also important to avoid using jargon, colloquial language and cultural references that learners who are migrants, speak English as a second language or are of a different generation to you may not understand.

Learners may become frustrated or tired during instruction and demonstration sessions. This can occur more frequently for learners with LLN issues, learning difficulties and disabilities, or if the session is not well timed or paced. Observe learners throughout the session for signs that they need a break or are ready to practise their skills.

## Nonverbal communication

Nonverbal communication is an important part of providing instruction and demonstration. Body language such as hand gestures can be used to emphasise important points. Be aware of your body language to ensure congruence between your words and actions, and also to avoid over-use of gestures. Learners can be easily distracted by a trainer's personal habits, such as repetitive gestures or pacing during a presentation or demonstration.

Video recording an instruction or demonstration session (with learners' permission) affords an opportunity to review the session to check your communication skills. Observe the learners' reactions at various points during the delivery to identify where there may be gaps in your communication skills.

Eye contact is a key element in any training situation. Don't allow yourself to focus on reading training materials or standard operating procedures while instructing or demonstrating. You need to 'know your stuff' so you can make eye contact with the learners, hold their attention and gauge their understanding. Make sure to interact with all learners equally, not just those who you know or feel more comfortable with.

You can use nonverbal communication to emphasise key points in the instruction or demonstration. For example, when you are explaining important safety information, make eye contact with each learner and reinforce your message by using appropriate body language.

## Questioning skills

Successful trainers understand that using a combination of open, closed and probing questions is an effective method for engaging with learners, keeping them focused and checking their progress.

Asking a range of questions provides you with the opportunity to:

- ▶ gather information about learners' initial competence for performing a skill
- ▶ develop a rapport and a positive relationship with learners
- ▶ motivate learners by using their responses as an opportunity to acknowledge their contribution
- ▶ clarify learning points
- ▶ gauge learning progress, including gaps in skills and knowledge
- ▶ gather feedback on your own performance during instruction and demonstration.

## Types of questions

There are three types of questions. These are listed and explained below.

### Open

Open questions require an extended answer. Ask them when you would like a learner to provide a detailed response; for example, after explaining a standard operating procedure, ask a learner to outline how they would apply the procedure to a particular workplace scenario.

**Closed**

Closed questions can be answered with a few words, or simply 'yes' or 'no'. Use a closed question when you would like the learner to provide a definitive response; for example, 'How many items can you include on a customer's order?'

**Probing**

Probing questions ask the learner to expand a little more on their initial response; for example, 'Your answer is right, but can you tell me more about how you will ensure you use the right equipment for the job?'

## Active listening

Active listening is fundamental to effective communication. Active listening is more than just hearing what a person says. Effective listeners are attuned to the speaker's body language, their tone of voice and the words they use. You can also 'reflect' – restate the speaker's words – to show your understanding after they have finished speaking.

Here are some suggestions to improve your listening skills with examples of their practical application.

**Stop talking**

- ▶ Workplace instructors have high levels of expertise and are enthusiastic about the subject of the training session. Avoid the temptation to ask a question and then immediately answer it yourself.

**Wait for the learner to finish speaking**

- ▶ Give the learner the opportunity to finish their response before seeking clarification or interjecting with an idea. You can't really listen if you are busy thinking about what you want to say next. Delay making judgments and forming solutions until you have heard the learner out.

**Pay attention**

- ▶ Avoid interrupting the learner. Instead, make sure you stay focused on what the learner is saying. If you feel your mind wandering, change the position of your body and try to concentrate on the learner's words and body language.

**Acknowledge all comments and questions**

- ▶ All input from learners is valuable. Comments and questions are opportunities to shape learning by paraphrasing and revising key learning points.

**Use paraphrasing**

- ▶ Paraphrasing means summarising what the learner has said in your own words to show that you have been paying attention and you understand what they have said.

## Enhance delivery using effective communication

A range of delivery techniques can be used when structuring, pacing and enhancing learning.

Workplace trainers should regularly reflect on how effectively they use their communication skills to create an appropriate learning environment and build relationships with learners.

A description of some communication skills that are relevant for providing work skill instruction follows.

### Coaching

- ▶ Use culturally inclusive language.
- ▶ Use a combination of question types.
- ▶ Use a quiet and positive tone; be mindful that other workers are likely to overhear the coaching.
- ▶ Model appropriate workplace language and behaviour.
- ▶ Be aware of the learner's personal space when working closely with them.

### Demonstration

- ▶ Explain technical terms or safety information at a 'lay person' level.
- ▶ Make regular eye contact.
- ▶ Check understanding; pause to ask and answer questions.
- ▶ Use even-paced delivery.
- ▶ Be aware of the learners' personal space when working closely with them.

### Explanation

- ▶ Introduce technical information or complex concepts carefully and explain unfamiliar terminology in plain English.
- ▶ Use questioning to check understanding.
- ▶ Be mindful of body language; avoid making distracting gestures.
- ▶ Maintain eye contact.
- ▶ Break up long explanations with practice sessions, pauses or questions.

### Group or pair work

- ▶ Provide a clear explanation of what is required.
- ▶ Use questioning to confirm understanding.
- ▶ Observe performance of the task and provide constructive feedback and support.

### Skills practice

- ▶ Revise technical information, complex concepts and standard operating procedures prior to practice.
- ▶ Explain unfamiliar terminology in plain English.
- ▶ Use questioning to check understanding.
- ▶ Observe performance of the task and provide constructive feedback and support.

## Question-and-answer sessions

- ▶ Use a range of questions (open, closed and probing).
- ▶ Allow sufficient time for learners to answer questions completely.
- ▶ Use active listening.
- ▶ Be patient.
- ▶ Be mindful of learner characteristics such as LLN proficiency or disability when formulating questions.

### Example

#### Use communication skills to instruct and demonstrate

Charlotte, the office manager of Glade Realty, is happy when Hannah accepts the receptionist position. Hannah's last job involved similar reception functions at a tyre-fitting service. Charlotte is confident that Hannah has the customer service skills required to do the job; however, she will have to provide on-the-job instruction to induct Hannah into the specific procedures for customer service at Glade Realty.

Charlotte makes sure that on the morning Hannah is to begin her training, they won't be interrupted. After expressing confidence in Hannah's ability to transfer her existing skills and knowledge to her new position, Charlotte probes to find out if Hannah has any concerns about her ability to complete the training or any questions she needs to have answered.

Hanna has a question about how to email phone messages to staff members. Charlotte explains that she plans to cover the email system tomorrow. For now they are concentrating on the telephone system and customer service.

Charlotte explains the importance of good customer service to the business. Hannah already knows something about this; however, Charlotte still wants to explain customer service in the context of a real estate business. She explains that there are many real estate businesses in the local area and that Glade Realty relies on their high standards of customer services to maintain a competitive edge.

Charlotte ask Hannah questions about her knowledge of telephone systems, then demonstrates Glade Realty's procedure for greeting a customer and transferring the call to the appropriate person. Charlotte demonstrates each step, shows Hannah how to use the telephone system instruction manual for information, then answers Hannah's questions.

Once Charlotte is confident that Hannah understands what is required she asks Hannah to practise what she's been taught. Charlotte observes Hannah and gives her feedback. At the end of the session, Charlotte leaves Hannah working alongside an experienced colleague for the remainder of the day.

Tomorrow they will briefly revise what has been covered and then continue with learning how to handle more difficult customer inquiries.

## Activity 12

This activity is designed to provide you with skills practice using the following delivery techniques:

- ▶ Coaching
- ▶ Demonstration
- ▶ Explanation
- ▶ Role-play
- ▶ Group or pair work

Deliver a training session that has the objective of developing a learner's teamwork and interpersonal skills. You will need to arrange for your trainer/assessor, manager or an appropriate colleague to observe in person or view a recording of the training session. They will need to record their observations and give you feedback that you can add to your assessment portfolio. Ask the observer to pay particular attention to how you use your communication and interpersonal skills to instruct and demonstrate to the learner.

Include time for skills practice, because you will need to observe the learner using their skills to interact with others. Record your observations and add them to your assessment portfolio.

Give feedback to the learner. You may want to arrange for your trainer/assessor to observe this feedback session as well.

[Click to complete Activity 12](#)

# 2G Provide opportunities for practice

A key component of successful learning is practising skills in a supportive learning environment. Incorporate opportunities for practising as a way of structuring learning experiences to maintain learners' interest and reinforce the skills and knowledge being developed.

Practice sessions can be used to reinforce learning, to develop skills under the guidance of the trainer providing work skill instruction, and to build learner confidence. Practice is also an opportunity for the trainer or coach to assess learner progress and identify any gaps in their skills or knowledge.

## The importance of skills practice

The learning program should incorporate sufficient time for the learner to practise the skills they are developing. They will also need to practise applying their newly acquired knowledge in a work environment.

Skills practice is important for a number of reasons:

- ▶ It can be conducted in an environment where learners can practise their emerging competence without being worried about making mistakes or completing tasks slowly.
- ▶ Learners benefit from the practical, hands-on approach (they get to put the theory into practice).
- ▶ The trainer has an opportunity to shape the learner's behaviour by observing and giving feedback.
- ▶ Gaps in the learner's skills and knowledge can be identified and corrected through further training.
- ▶ Evidence can be gathered for formative assessment for learners who are completing a training package qualification.
- ▶ Learners can integrate the skills and knowledge they are developing.
- ▶ The trainer is able to recognise learner readiness to take on new skills and tasks.

## Skills practice through work activities

Practising skills through work activities provides learners with an opportunity to apply knowledge and practise their skills on authentic tasks that contribute to the work group's output. It's also an opportunity to interact with other members of the work group and collaborate with their more experienced colleagues. However, monitoring and supervision are necessary so any mistakes don't go undetected and cause production or workflow effects.

Skills practice can also take place away from the production environment, perhaps in a training room or simulated environment.

Skills practice in a simulated environment is appropriate:

- ▶ when the learner is still in the early stages of a learning program and is practising basic skills
- ▶ when there are WHS or quality risks
- ▶ when the workplace cannot accommodate skills practice because there are insufficient resources or work patterns don't allow for interruptions or slow performance.

## Facilitate skills practice

Timing and resource availability are also constraints. Sufficient work and resources must be available for the learner to use for practice. The learner may need to make several attempts in order to produce the desired outcome or finished product. The trainer will also need to carefully consider the timing of skills practice in the workplace. It may be necessary to avoid peak times because you could create production or service bottlenecks if the learner performs tasks slowly. Wherever possible, a trainer or coach should be easily accessible to the learner during skills practice to monitor and support them.

Skills practice sessions require the same level of planning and attention as the instruction or demonstration components of training.

Facilitating skills practice requires careful planning to identify:

- ▶ the skills to be practised and the knowledge that will be applied
- ▶ the order in which skills are to be practised
- ▶ what resources are required during the practice
- ▶ written instructions for the practice tasks
- ▶ whether observations of the skills practice are to be recorded for assessment purposes.

In this example, a workplace trainer plans a series of practice activities of increasing complexity to develop a learner's competence.

### Example

#### Provide opportunities for practice

Premier Paper Products installs a new printing machine in the paper production plant at a regional site. Kevin, a senior machine operator at an interstate site, travels to the production plant to provide on-the-job instruction and coaching for the team of four machine operators.

Kevin intends to use the training delivery plan that was used when a similar machine was installed at the plant where he works.

Once training is underway at the plant, Kevin finds that the team seem to be able to apply much of their existing knowledge to the new machine. They quickly learn and apply its features. However, he is concerned about one team member, Juanita, who is finding it difficult to follow the manual because English is her second language. Kevin makes a note to contact the manufacturer to see whether he can obtain a Spanish version of the manufacturer's operating manual for her.

Before Kevin signs off the machine operators as competent, he schedules a series of practice activities. Each activity is slightly more complex than the preceding one, using finer designs and requiring more planning and technical skills. He will also gradually reduce the amount of guidance he gives as each operator progresses through the practice activities.

Kevin is mindful that until the instructions are available in Spanish, Juanita may continue to need additional support. Even though Juanita knows her team well and jokes about not being able to read English confidently, Kevin knows that he will need to be discreet when he gives her extra support in the practice sessions.

## Activity 13

This learning activity will give you an opportunity to practise your skills in providing opportunities for learners to practise during instruction and work activities.

Lead a skills practice session as either part of your first workplace training session or as a separate activity using the case study that follows.

Prepare a delivery plan that you can follow for the skills practice.

### Case study

You have been asked to lead a brief session in which you instruct learners on hand-washing techniques for carers to use at a childcare centre. Your session must include an explanation and skills practice.

The following is the hand-washing procedure that workers are required to implement.

#### Childcare centre hand-washing procedure

##### Hand-washing is most effective when these guidelines are followed:

- ▶ Use a sink that is solely for washing hands.
- ▶ Use warm running water; cold running water is acceptable if warm is not available.
- ▶ Dampen hands.
- ▶ Dispense liquid soap from dispenser.
- ▶ Clean all hand surfaces with soap, including the sides, backs, between fingers and underneath fingernails.
- ▶ Use a scrubbing brush to clean dirty fingernails.
- ▶ Lather and rub hands for at least 20 seconds.
- ▶ Rinse thoroughly with running water.
- ▶ Turn off the tap using a paper towel or your arm. If possible, use a tap with an automatic sensor.
- ▶ Use paper towel to dry every surface of the hands thoroughly.

[Click to complete Activity 13](#)

# 2H Provide and discuss feedback on learner performance

Feedback is an important part of the learning experience. Positive, constructive feedback can be used to motivate people and confirm their commitment to learning. The time and effort you take to give feedback also demonstrates your commitment and interest in supporting a person's development.

Workplace learners respond well when trainers and supervisors acknowledge and praise the effort that they put into improving their performance. Feedback is a powerful training tool and needs to be provided with care and sensitivity.



Feedback may be given to learners as they progress through the learning program and again at the completion of the program. RTO trainers and assessors are required by organisational policy to provide formal feedback to learners.

## Feedback as a training tool

In a learning environment, feedback is information about a person's performance as observed by the trainer. You might share information with a learner about their behaviour, their work performance, their work practices and their skill development, including where they were effective and ineffective.

Giving feedback to learners on their performance is an essential component of workplace training that helps learners to stay focused and motivated. Feedback includes acknowledgment, praise, constructive advice and planning for further improvement. When you give feedback that includes praise, you are creating a powerful incentive to continue learning.

Trainer/assessors, workplace supervisors and frontline managers are all responsible for providing regular formal and informal feedback. Workplace policies and procedures usually provide guidance in relation to formal feedback mechanisms; a structured work skill instruction program may also provide guidelines for you to follow.

The goal of positive and constructive feedback is to shape the performance of the learner by using the feedback discussion as a developmental opportunity. The learner should leave the discussion feeling confident that they can improve.

## Provide effective feedback

For feedback to be effective, it must be given in a supportive way. Effective feedback relies on trainers communicating constructively and positively with a view to assisting learners to understand their progress. The interpersonal skills that you use to deliver training are also required to give feedback. Recognise and be sensitive to people's needs, characteristics and diversity.

Constructive feedback requires that you reframe what you have observed by comparing a learner's actions with the requirements of the task and allowing them to identify where they did well and where they can improve.

Supportive feedback is always positive. Regardless of the learner's success or failure in the attempted task, you should praise their effort and follow up with constructive feedback.

A trusting relationship between the trainer and the learner is crucial to giving/receiving effective feedback.

Effective feedback:

- ▶ describes the learner's performance
- ▶ is based on specific examples of the learner's performance
- ▶ gives the learner an opportunity to self-assess and feel empowered to contribute to the discussion
- ▶ balances positive and negative comments
- ▶ is ongoing
- ▶ focuses on developing goals for further learning or practice to improve performance.

## Preparation for providing feedback

Sound preparation prior to providing feedback will position you to make a valuable contribution to the feedback process. Plan your comments prior to giving feedback, noting suggestions for improvement or further learning and development. Support your comments with factual and unbiased observations, including feedback from colleagues and experienced workers if appropriate. You should also encourage a learner to self-assess and include this in a feedback session.

Recording observations of a person's performance on an observation checklist is a useful way of keeping an ongoing record of performance that can be used to provide feedback.

Ask your trainer for a 'Feedback questionnaire' template. This form can be used to give formal feedback where a learning program includes assessment against competency standards.

In some circumstances making an audiovisual record of learner performance is an appropriate feedback aid.

## Methods for giving feedback

Do not give feedback in a public forum, such as in a team meeting or posted on a workplace learning management system. Make time to give each learner individual feedback in a private area where you cannot easily be observed or overheard.

The method you use to give feedback will reflect the training method that you are using. For example, if you are delivering a formal learning program and have organised to observe the learner transferring their skills and knowledge to their daily tasks, you may want to organise a formal feedback session. If you are coaching or mentoring learners, you may use less formal methods to give feedback.

The principles of an effective model for giving feedback apply in most learning contexts.

### A model for giving feedback

1. Set the stage for giving feedback – a private space, a supportive tone and an emphasis on learning.
2. Describe the current performance, based on observations, learning and assessment activities and work samples.
3. Compare performance against the required standards and benchmarks.
4. Identify strengths and weaknesses.
5. Set goals to address weaknesses and improve performance.
6. Revise the learning program to include strategies to achieve new learning goals.

## Feedback following assessment

You may be involved in a learning program that relies on assessment to judge competence. In these circumstances, feedback can be a significant obligation and must be timely, accurate, clear and constructive.

Learners completing a learning program based on training package competency standards will hope to hear that they have been judged competent and that they are progressing toward the completion of a course of study or statement of attainment. In some cases, you will need to inform a learner that they are not yet competent and need to undertake further learning and development.

In all cases, your goal should be to provide feedback at appropriate intervals to support the further development of the learner.

### Example

#### Provide and discuss feedback on learner performance

On his retirement, Bill joins a community group that offers a 'walks and talks' program for visitors in the local bush reserves. Bill has a vast knowledge of local flora and fauna and the group's president invites him to lead a guided walk. Bill is passionate about bush regeneration and is keen to share his knowledge, particularly with people younger than himself.

Nola meets Bill early on the morning of Bill's first guided walk to explain to him what is required of volunteer guides. The explanation covers WHS, emergency procedures, using equipment such as the GPS, and the timing and route of the walk scheduled for that morning.

Bill is confident and enthusiastic as he heads off on his first guided walk. Nola walks at the rear of the group so she can observe Bill's performance.

Later, when the group has dispersed following the walk, Nola meets with Bill to give him feedback on his performance.

Nola has planned what she is going to say to Bill. She begins by acknowledging his knowledge of the bush and the passion with which he explains the importance of preserving threatened species. She also praises his clear explanation of the rules for the walk.

Next she gives Bill some feedback about areas she thinks he needs to work on. She uses specific examples to explain her observations; she noticed that Bill asked the group questions and then gave the answer without giving people enough time to respond. She also asks Bill to remember that not everyone is as fit as he is and some may find it hard to keep up with his lively pace.

They finish the session on a positive note when Nola expresses her confidence in Bill and says what an asset he will be to the group.

## Activity 14

Read the case study, then complete the task that follows.

### Case study

Tom has developed a reputation as someone who can't be trusted to meet a deadline. Ian, his new supervisor, hears from several of Tom's colleagues that he has let them down on many occasions. Ian observes Tom over a two-week period and asks him to keep a diary in which Tom records a self-assessment of how effectively he manages his work priorities each day.

Tom and Ian review the diary together and agree that Tom is not effectively prioritising his daily tasks. By the end of each day Tom feels so overwhelmed with trying to finish his work that he often leaves the office with several tasks (sometimes the most important ones) not completed.

Ian says that he would like to help Tom improve his performance. Tom agrees.

Ian spends time every day for a couple of weeks coaching Tom on time-management skills, including preparing a 'to do' list, managing work interruptions, prioritising his tasks and keeping the supervisor informed of any bottlenecks or delays that could affect the team.

Overall, Ian notices an improvement in Tom's performance. Fewer tasks are left unfinished each day. Tom spends time each morning preparing his 'to do' list and seems to be working through it appropriately. The most important issue that Ian observes is that Tom finds it hard to refuse requests made of him by other people. No matter how busy he is, he agrees to take on more work if asked to do so.

Plan the feedback that Ian, the supervisor, should give Tom. Write an outline that identifies each of the points that Ian will need to cover, relevant examples and the order in which these should be addressed in the session.

[Click to complete Activity 14](#)

## Summary

1. Workplace trainers use their interpersonal skills to create an atmosphere in the learning environment that encourages learners to try new ways of doing things, ask questions that may expose gaps in their knowledge, and share their experience, ideas and concerns.
2. The delivery plan provides a structure to follow in a training session, but it needs to be flexible in case you need to adjust the timing, content or delivery method to ensure learning outcomes are achieved.
3. One of your duty-of-care responsibilities is to brief learners on all WHS procedures and requirements, including explaining the safe work practices that apply to the learning environment and the application of work skills.
4. The delivery techniques that you select should provide a learning experience that motivates and engages learners, offering them the information needed and an opportunity to practise their developing skills.
5. Coaching is often used in combination with other forms of training and may occur at any time during or after instruction. Work skill instruction can be reinforced with effective coaching.
6. Effective instruction and demonstration can only occur when the person delivering training is able to use appropriate communication skills.
7. The learning program should incorporate sufficient time for learners to practise the skills that they are developing. They will also need to practise applying their newly acquired knowledge in a work environment.
8. Constructive feedback helps students to understand their strengths and weaknesses, and motivates them to improve their performance.





## Topic 3

In this topic you will learn how to:

- 3A Measure learner skill and knowledge acquisition and use**
- 3B Monitor learner progress and outcomes**
- 3C Review and adjust the learner-trainer relationship**

## Check training performance

Effective trainers do not wait until the completion of a learning program or a final assessment activity to gather information about the effectiveness of the learning program and their delivery techniques. A range of factors may affect the learning process, so it's important to monitor learner progress to identify whether learning milestones are achieved and learning objectives are likely to be reached.

Checking training performance and identifying issues as they arise gives the trainer an opportunity to respond and make improvements. They can change their delivery technique, involve other people in delivering the training, provide more practice opportunities or make adjustments to the way they interact with the learners.

Checking training performance and monitoring learner progress can occur in different ways depending on organisational procedures and requirements. Learner feedback and self-assessment, observation of the learners applying skills, and a review of coaching can provide valuable insights into training performance. The trainer should seek to create an atmosphere where feedback is encouraged and used as the basis for improving learning outcomes.

# 3A Measure learner skill and knowledge acquisition and use

It is good practice to monitor learner progress during training delivery rather than waiting until the learning program is completed. Measuring learners' progress against the objectives that were developed at the outset of the learning program provides an opportunity for you to take action to address any problems or issues that may arise. You will also want to check learners' progress at various points through individual instruction or demonstration sessions, moving on to higher-order skills and knowledge.



## Measure learning and training performance

Effective training must produce outcomes that align to the learning program. Trainers must be able to identify whether learners are acquiring and can use the skills and knowledge developed during training.

To check on the effectiveness of training performance and learner uptake of skills and knowledge, there must be clear guidelines for monitoring and evaluation. The approach to monitoring and evaluation may differ according to the type of learning undertaken and the reason for it, as shown in the examples below.

### On-the-job coaching

- ▶ To review the success of on-the-job coaching, you might discuss with learners how they are responding to the coaching arrangements.

### Formal training

- ▶ To assess the effectiveness of formal training, you might ask learners to complete a questionnaire and give you input on how training performance and the program could be improved.

### Training workshop

- ▶ To review a training workshop, you might conduct a team debriefing session and provide a questionnaire for learners to complete.

### Third-party reports

- ▶ To get a broader perspective, you may collect third-party reports (from learners' mentors) as well as reports from the employees involved in the partnership with the training organisation.

## Monitor and evaluate

Monitoring and evaluating workplace learning and performance identifies whether the instruction has helped an individual:

- ▶ achieve the learning objectives that were set for them
- ▶ acquire and use new skills and knowledge.

Evaluation can also show whether the learning program helped the employee achieve team and organisational goals.

## When to measure

Plan to measure and evaluate learner progress at various points during work skill instruction. This applies whether you are delivering several sessions of instruction and demonstration over a period of time or you are delivering training in only one session. At the conclusion of training, confirm that each learner is equipped to apply new skills and tasks in their work environment, allowing time for the learner to transfer their new skills and knowledge into work practices.

## Measures to use

The methods used to measure and evaluate learner progress and training performance may be influenced by the method used to deliver work skills training. Two important measures are:

- ▶ formal performance review
- ▶ learner surveys.

Employee skill and knowledge development can be assessed in formal performance review sessions in which skills and achievements are measured against objectives and goals. Any remaining learning gaps can be identified and additional development activities planned or training delivery reviewed in response.

A formal debriefing immediately following a training session will reveal learners' thoughts about the training. Then you will need to wait until learners have had a chance to put their learning into action and you have observed, questioned and viewed skills demonstrations as appropriate. Prepare for these sessions with a set of questions and inform learners what is expected of them.

Learner surveys are usually applied at the conclusion of the learning program or training session, but can also be used during training to gather progress reports about program effectiveness. Surveys require a significant investment in planning, developing and testing the survey tool if reliable data is to be gathered. Successful and effective surveys have well-constructed questions to gather essential information, are easy to understand and are quick to complete.

There are numerous other measures that can be used to measure and evaluate learner progress and training performance. Some of these are explained below.

### **Informal review or discussion**

- ▶ Although structured discussions and formal surveys are valuable, you can also learn a lot from informal discussions with people during and after a learning program. Chatting with work colleagues or asking questions as you observe learners using their new skills can produce valuable insights into skill and knowledge uptake.
- ▶ Keep a notebook handy to record observations or comments and be prepared to hold more formal follow-up discussions if necessary.

### **Third-party report**

- ▶ Learners' workplace supervisors or work colleagues are well placed to evaluate people's ability to apply their skills in the work environment. If you have delivered work skills training outside your work area, the third party can give an evaluation of the person's skills. Provide a checklist to record observations against criteria that measure whether the skills have been gained and where improvement may be needed. Be sure to remind people who have agreed to prepare a third-party report that feedback should always be constructive and non-threatening. Explain the process thoroughly to all those involved.

### **Demonstration**

- ▶ Learner demonstration is an effective method for identifying whether the new skill or knowledge has been developed. You can use demonstration as a measure of performance during and after training. During the delivery of training, demonstration of task mastery can be required before progressing to instruction for the next step, finishing with demonstration of the complete task. To evaluate learner performance, you may ask them to demonstrate the skill for you or a third party in their workplace. Record your observations on a task checklist that you can give to the learner.

### **On-the-job observation**

- ▶ Working alongside the learner and asking how their work is going will give you a sense of their progress and level of performance. Observing them as they go about their day-to-day activities is a simple and accurate means of measuring skill (and knowledge) acquisition and use. Questioning can establish their level of knowledge, including their ability to deal with contingencies. On-the-job observation also helps you to identify where additional support or instruction is required.

### Review of peer coaching arrangements

- ▶ Feedback from other people involved in coaching the learner in the work environment can help you evaluate the effectiveness of training performance. A peer coach (a colleague in a learner's work group with the skills and experience to be able to coach others) is ideally positioned to gather information and to form a view of the learner's progress and the outcomes that are being achieved. Brief the peer coach about the kind of feedback required and the measures you want them to use – how and when – to confirm learner skill and knowledge acquisition and use.
- ▶ Using peer coaches and asking peers to share information about another person's performance should be done sensitively and with due consideration of privacy and confidentiality. You may need to guide and mentor a peer coach to develop the skills to provide constructive feedback.

### Self-assessment

- ▶ Self-assessment can be used to encourage the learner to monitor their own development and advise you when further support is required. Self-assessment tools encourage self-directed learning so learners can monitor their accomplishment of tasks. They can be given before and after questionnaires so learners can measure their progress. Learners have an opportunity to reflect on completed work and to develop strategies to improve their performance. The learner should identify any problems, decide on a solution and report on their self-evaluation.

### Assessment

- ▶ Learners undertaking competency-based training will be formally assessed by a qualified assessor. You may be asked to contribute to or participate in the assessment by helping the learner to gather evidence that can be used to judge competence against the benchmarks in competency standards. Likewise, if you are required to deliver training that addresses a particular need in an organisation, you need to know what assessment criteria exist.

The following example demonstrates how a workplace trainer uses measures at various stages during the training to gauge the learner's progress.

## Example

### Measure learner skill and knowledge acquisition and use

Key Computer Solutions offers a computer repair service to its customers. Mary joins the business after completing the first year of an information technology diploma.

Brandon is given the task of instructing Mary in completing a series of basic service and repair tasks. More-complex jobs are assigned to experienced computer technicians.

Brandon begins the first instruction session by asking questions before the training begins to gauge Mary's current skills and knowledge. He then gives her an overview of the service and repair process; explains the application of workplace policies and standard operating procedures; and describes the specific tasks that he wants her to learn. Brandon asks questions to confirm that Mary understands what's required of her so far. Once he is confident that Mary has a good picture of what the job involves, Brandon gives a step-by-step demonstration of the procedures involved in carrying out a basic service on a laptop computer, referring to the standard procedures as he does so.

Before giving Mary the opportunity to practise the skills, he has her explain to him what she is required to do. He then observes Mary practising the activity.

Brandon asks Aamir, an experienced technician, to act as Mary's peer coach to guide her while she learns her role. Brandon posts a reminder in his electronic diary to check with Aamir for feedback.

## Activity 15

Use the delivery plan from Activity 8, another delivery plan that you have developed or one that has been developed for you.

Review the delivery plan and identify the measures that you will use to ensure learners are acquiring and can use their new skills and knowledge in the workplace.

You will also need to plan how you will implement the measures before, during and after training.

Write a description of:

- ▶ the measures you will use
- ▶ your reasons for selecting these measures
- ▶ when you will measure learning progress.

[Click to complete Activity 15](#)

# 3B Monitor learner progress and outcomes

Trainers providing work skill instruction have a responsibility to monitor each learner's progress and to give them feedback. How and when this occurs may be determined by organisational policy or by the learning program.

There will be times when a learner doesn't progress according to the goals established in the learning plan. Effective monitoring that involves the learner may reveal barriers to achieving desired outcomes. Trainers should use their interpersonal and communication skills to provide constructive feedback, work with the learner to identify barriers, and develop strategies to overcome the barriers.



## Monitoring the learning program

It is important to monitor training performance at key points to check learner progress and skill and knowledge acquisition. You will need to identify how, when and where monitoring is to occur and what level of consultation with the learner is required in this process.

Once instruction is completed it may be difficult, expensive and time-consuming to address performance gaps. Although various measures can be used to monitor and evaluate learner progress, it is important to regularly consult with the learner about outcomes. Learners should feel that they are involved in decision-making about their progress.

Generally the learning program, delivery plan or organisational procedure will guide what is required to effectively monitor learner progress.

### Tools for monitoring and documenting learner progress

- ▶ Checklists completed during observation and demonstration
- ▶ Periodic review discussions with the learner
- ▶ Learning activities completed by the learner
- ▶ What sessions the learner has attended
- ▶ Assessment outcomes or progress against standard operating procedures or workplace benchmarks
- ▶ Elements, performance criteria or units of competency for which the learner has completed learning activities

## Consult with learners

Plan time in the learning program for consultation so that you and the learner can review progress, strategies and outcomes. Consultation during delivery allows the learner to provide valuable feedback about whether their needs are being met. Although consultation can occur at a group level, you must also allow for private discussions with individual learners so that any needs or problems can be fully and frankly discussed.

It is often easier to monitor the progress of single learners. Mentoring or coaching an employee or supervising their daily work routine allows you to interact with them while you observe them applying their developing skills and knowledge to routine tasks. You are able to give informal feedback. You should be prepared to ask the learner questions that will help you to evaluate the various dimensions of their learner's learning and development.

## Gather feedback

Seek feedback from learners at regular intervals during the learning program to ensure that expectations are being met. Asking learners to self-assess or provide feedback is a useful way of monitoring progress and outcomes from a learner perspective. This can be done with feedback or evaluation forms; many organisations have prescribed forms or templates that you must use to record learner progress.

Informally, your observation and questioning skills will allow you to determine learner progress and satisfaction with a session, though you may want to ask learners to provide feedback in a more formal way to confirm your observations.

Refer to organisational policies and procedures to determine requirements relating to progress reporting requirements, how reporting is to be done and how often.

## Strategies to improve learning

Your role in providing workplace instruction and demonstration will determine how much contact you have with learners. Be alert to signs of any problems you need to discuss with individual learners so that a plan to overcome the problem can be developed.

There is every possibility that you will experience situations in which a learning program, delivery plan or work skill instruction does not achieve the intended outcome. You may need to adjust instruction or demonstration in response to these situations.

The strategies that you could use include:

- ▶ seeking advice from an experienced trainer
- ▶ revising the learning program or delivery plan
- ▶ changing delivery technique
- ▶ calling on a specialist to help the learner with a particular issue.

Note that the relationship between the learner and trainer is a key ingredient in the success of workplace training. Occasionally the learner and the trainer will be unable to form a sound working relationship. In these cases there may need to be break from mentoring or another mentor can be recommended.

The following table outlines common issues that affect the success of work skill instruction and strategies that a trainer and learners can use to address them.

Issue	Strategy
The learner did not disclose relevant personal information (such as a disability or learning problem) during planning	The trainer and learner may decide to seek specialist support. The trainer should consult with the learner to find out what types of delivery techniques have been most successful for their learning in the past. The trainer will need to be flexible in their approach and use a range of delivery methods.
The learner's LLN skills are not at an appropriate level	Arrangements may be made to provide additional training that specifically targets LLN.
Learning resources and materials are not of the required quality or do not suit the individual needs of the learner	The trainer may seek substitutes or modify materials to suit learner needs. Replacement resources may need to be developed in house or by a specialist.
Insufficient opportunities to practise skills	The learning program and delivery plan should be revised to incorporate additional opportunities. The trainer should consult with the learner about the amount of practice they feel is needed.
Poor support from workplace supervisors or managers	If the learner reports that they are not being given the opportunity to apply their skills and knowledge in their actual work area, the trainer should consult with the learner and their supervisor or manager to explain strategies for transferring learning to the workplace.
Uncomfortable or inadequate learning environment	Learners should be asked whether there are any aspects of the learning environment that are preventing them from learning. The trainer may be constrained in how effectively they can address these problems. Assistance should be sought from appropriate specialists in the organisation.

Monitoring can take many forms, as the next example shows.

## Example

### Monitor learner progress and outcomes

Zorian is coaching Claudia in her new role as a personal trainer at Get Moving Fitness Centre. Claudia is a qualified but inexperienced fitness trainer; Get Moving has a specific format and approach that personal trainers must follow that she needs to know about. Zorian has a learning program that he uses to ensure that new personal trainers receive appropriate induction training into the Get Moving WHS system, customer service, code of conduct and personal training approach.

Zorian spends a significant part of the first learning session finding out about Claudia's previous experience, her style and the personal training methods she uses. Together they set specific learning goals that will ensure that Claudia is fully inducted and able to work independently with clients within two weeks.

Rather than deliver all aspects of the training himself, Zorian coordinates other team members to participate in Claudia's induction. Zorian reminds each peer coach that they need to be discreet when coaching or observing Claudia's interactions with clients – she needs to develop a relationship with her clients based on trust and confidence in her expertise.

Zorian meets with Claudia at the end of week one to evaluate her progress. He shares with her the feedback from her colleagues and favourable comments from several clients. At the end of week one, Claudia identifies the areas in which she needs further coaching support and agrees on goals for her learning program for the next week.

## Activity 16

You are training a young worker, John, to provide customer service and prepare coffee at a local cafe. John has progressed well during instruction and demonstration sessions; however, feedback from other staff and customers indicates that he is not providing service to the expected standard.

Feedback indicates that the John can apply his skills and knowledge to a specific task but becomes frustrated and anxious if he has to leave the task to attend to something else. For example, yesterday while John was preparing an order he was called away to make coffee. Once he had finished making the coffee, he forgot to return to his original task and the customer was kept waiting for her order.

1. Conduct a role-play in which you review John's progress with him and plan further training. John (played by your trainer, colleague or classmate) is aware that he is still in the trial period of his employment. He has only recently left school and has no previous customer service experience.
2. Your trainer/assessor or a colleague should record and discuss their observation of your performance with you.

[Click to complete Activity 16](#)

# 3C Review and adjust the learner-trainer relationship

The relationship between a trainer or coach and a learner is pivotal to the success of work skill instruction. A trainer can deliver a well-paced training session that is supported by engaging audiovisual materials and creatively structured learning activities, but in the absence of a good relationship with the learner even the best training is not likely to achieve the desired learning outcomes.



Effective communication and good interpersonal skills are essential in order to identify what each learner needs from the relationship and establish what adjustments are necessary to improve the relationship. To ensure success, the learner-trainer relationship should be regularly reviewed and to make sure it is meeting learner needs.

## Evaluate the learner-trainer relationship

The relationship between the trainer and the learner is key to the success of a learning program or the training performance of a learner. When the trainer or coach is also the learner's workplace supervisor or team leader, this relationship can influence the training relationship.

The trainer should consider during the planning stage of training how they will review their relationship with the learner. Direct methods include seeking feedback from the learner, recording reflections in a learning journal, and taking note of comments made by learners during informal discussions. A 'critical friend' – usually a work colleague of the trainer/coach – might be asked to record observations of instruction or demonstration sessions and comment on the relationship between the trainer and learner.

The trainer's communication and interpersonal skills are the key to building a good working relationship with learners and other stakeholders in workplace training. Reflect on the type of relationship with learners that is desirable and consider the elements of what makes a successful relationship between trainer and learner.

### Features of a good learner-trainer relationship

- ▶ Trust and respect
- ▶ Commitment
- ▶ Empathy
- ▶ Respect for personal and professional boundaries
- ▶ A positive attitude toward learning and development
- ▶ Sensitivity to individual differences and diversity

## Build learner relationships

It is important for the trainer to be sensitive to signs that the learner's needs are not being met and find out whether it is the learner-trainer relationship that is posing a barrier to skill instruction or demonstration. Feedback from learners, and others able to view the relationship from a distance, can help identify where improvement needs to occur.

Feedback gathered from learners at various stages of the learning program should establish whether you are communicating with learners in a way that supports an effective working relationship. A relationship that is built on openness, honesty, integrity and trust will encourage the kind of feedback you need to foster effective learning.

In some cases, learners may be quite direct in telling you that they are not satisfied with your delivery techniques. In other cases, you may observe that the learner is not responding positively to work skill instruction or is not reaching their goals, but they are unable or unwilling to explain why. You may want to record your instruction or delivery sessions for your own review to critically reflect on how you are using your communication and interpersonal skills.

Your manager, a qualified and experienced trainer or a human resources professional can help you plan how to improve your relationship-building skills. They can also help you develop strategies for identifying learner needs. You can undertake professional development to improve communication skills or work with a mentor who has exemplary communication or leadership skills.

In the next example, a trainer realises that his attempts to use humour and anecdotes to build rapport are not successful with all learners.

### Example

#### Review and adjust the learner-trainer relationship

Jack began work over 40 years ago as an apprentice carpenter and spent many years as a builder and later as a WHS coordinator, which was his last role in construction. His career path took a new turn when he joined a training academy as a carpentry trainer. After completing a diploma, his role now involves running on-site WHS training for companies across a range of industries, from construction to food processing.

Jack is proud of his reputation for delivering interesting, meaningful and insightful WHS training sessions to operators and professionals alike.

This month Jack is training a group of machine operators in a confectionery plant. He has met all of the learners previously, except for a young woman called Nisrine who is new to the company. He finds out that she has been an auditor in the aged care sector – what he thinks of as a 'desk job'.

The course is a great deal of fun as usual. Jack holds forth with funny stories about his experience 'back in the day', of the various breaches of compliance and their consequences that he has observed first-hand. He calls on individual learners who have experience he thinks is relevant to answer questions or participate in demonstrations.

Jack isn't surprised when Nisrine asks to see him after the first week. He assumes she is struggling because she can't apply her previous experience as an auditor in the aged care industry to the content of his training sessions.

As their meeting progresses, Jack realises that his training style has offended Nisrine. She points out that he uses examples that rely on stereotypes and that he portrays women (and men) of some cultures quite negatively. Moreover, his humour uses language that she and several others in the group find offensive. She also says that whenever Jack asks questions he looks only to men close to his own age for answers; he hasn't asked her to respond to questions or called on her to share her experience, even though she is the only learner in the group with auditing experience.

## Activity 17

To complete this learning activity you will need to have delivered instruction or a demonstration of work skills in an actual or simulated workplace.

1. Critically review the learner-trainer relationship that was established. It will be helpful if you gather feedback from:
  - ▶ the learner – on what you did well in the relationship and what you could improve
  - ▶ an observer (such as your trainer/assessor or a work colleague) – on how to evaluate the quality of your relationship with the learner and where they think there is opportunity for improvement.

Ask everyone who observed the session to comment on your communication and interpersonal skills.

2. Analyse the feedback that you have gathered and write a critical reflection of around 500 words in which you compare and contrast your perception of the relationship with the perception of the other stakeholders (including the learner). Most importantly, write about the specific actions or changes you could make to improve the relationship next time.

[Click to complete Activity 17](#)

## Summary

1. Workplace trainers should plan to evaluate learner progress at various points during the learning program; it is important to be able to report the difference between the skills and knowledge of the learners before and after training.
2. Learner surveys are often administered at the conclusion of a learning program. They are particularly useful when information needs to be gathered from a large number of people.
3. Working alongside the learner and interacting with them is an effective method for monitoring their progress and level of performance. Observing them as they go about their day-to-day activities is a simple means of measuring skill acquisition.
4. Learners should be encouraged to monitor their own development and readiness to transfer skills to the workplace.
5. The trainer/coach needs to reflect on whether their performance and their delivery techniques are meeting the learner's requirements and make adjustments as needed.
6. Communication and interpersonal skills are the key to building sound, professional relationships with learners and other stakeholders in workplace training.



## Topic 4

In this topic you will learn how to:

**4A Reflect on your personal performance**

**4B Maintain, store and secure records**

## Review training performance and record-keeping procedures

Critical reflection is a skill that effective trainers should practise regularly. You will spend time reviewing feedback from stakeholders; re-reading your own notes and journal entries; and reflecting on the observations that were made of your performance by a mentor, experienced trainer/assessor or critical friend. Critical reflection should result in a trainer identifying aspects of their performance that they can improve through professional development.

Throughout instruction and delivery, you will need to maintain accurate training records. In the final stage of a learning program, you must ensure that learner records are correctly and securely stored according to organisational policies and procedures.

# 4A Reflect on your personal performance

Your workplace will benefit from continuously improving the processes used to provide work-skill instruction. Reflecting on your own contribution to the learning process and documenting strategies for improvement are integral to your role as a trainer.



## Reflect on your practice

Regularly review your performance as a trainer, including your overall contribution to work-skills training. Reflecting on your practice will ensure you identify opportunities for improvement. You can do this in a formal way, through a performance review with a manager or a formal feedback process with the learner and other stakeholders. Reflection can, of course, be less formal; for example, discussing observations made by supportive colleagues, qualified trainers or the learner.

To develop an action plan or professional plan for improvement, integrate the feedback you have received on your performance, analyse it, and make a determination about where improvement is required and how you can action it.

The following table summarises key aspects of your performance that you should reflect on during and after workplace training activities.

Aspects of performance	Reflective questions
Managing groups	How prepared were you to deliver group training?
	How effectively did you greet learners individually and as a group?
	What strategies developed a rapport with learners?
	How did you establish your credibility with learners?
	How did you model positive behaviour and attitudes?
	What ensured that learners understood the learning objectives?
	How did you ensure you were using delivery techniques that were suitable for individual learners?
	How did you encourage the learners to ask questions?
	What strategies were most effective for managing the group?
	How did you ensure equitable access for learners?
	Were the resources and equipment sufficient and appropriate?

<b>Aspects of performance</b>	<b>Reflective questions</b>
Communication and interpersonal skills	How did you ensure you were listening for evidence of learning progress and engagement with session content?
	What did you do to create an atmosphere that encouraged learners to try out new behaviours and skills?
	How did you use your communication and interpersonal skills to encourage learners to engage with the learning content?
	How did you convey that learners' questions, contributions and feedback were valued?
	Were you satisfied that you demonstrated tolerance and encouraged a positive attitude to cultural diversity?
	Did you give feedback that was direct and specific and shape performance?
	How effectively did you use humour, body language and verbal skills to motivate and engage with learners?
Delivery	Were the on-the-job benefits of meeting the learning objectives clearly explained to learners?
	Did you encourage learners to try and find answers to questions rather than answering all questions yourself?
	What were the challenges in changing delivery methods to suit the needs of learners?
	Was the learning environment supportive?
	Were learners encouraged to share their experience and understanding to scaffold learning?
	How effectively did learning resources and materials contribute to the achievement of outcomes?
	How well did you manage your time during skills training? Did this help you to ensure all learning objectives were met?
	Were explanations and procedures clearly communicated and supported by relevant examples?
	Do you think you were effective in reinforcing essential or critical learning points, particularly safety information?
	What strategies did you use to check learning progress?
	Were cues from learners interpreted to identify when to change delivery techniques?
	Was sufficient support provided to learners to help them transfer their learning to their job?
What types of adjustments were made to delivery techniques and communication in response to learner feedback?	

Aspects of performance	Reflective questions
Feedback and review	What could have been improved in the physical environment?
	Were any of your contingency plans implemented? Were they successful?
	What level of satisfaction did learners report regarding opportunities for skills practice?
	What method gathered the most reliable feedback on content and delivery?
	How did you encourage learners to suggest improvements to training activities?
	Were there any WHS issues that need action?

## Implement improvements to your performance

Some actions that you need to take to improve your performance can be accomplished with your current resources and skills. For example, you need to revise the instructions that you give to learners for using learning resources or increase the amount of time you give to learners to practise skills immediately after a demonstration. These actions can easily be taken as part of your training role.

Alternatively, you may not have the necessary resources to effect an improvement to your practice. For example, you need to collaborate with a subject matter expert to improve your knowledge of current work practices. In this case, you could seek the assistance of a more experienced colleague or consult your workplace manager to plan professional development activities. You may need to allocate or apply for resources to take these actions.

Use an appropriate document such as a professional development plan to formalise your plans to improve your skills. A professional development plan enables you to identify your goals, establish a time line and specify the actions you intend to take. You can then use the plan to monitor your performance and as a reference when participating in your organisation’s performance management system.

## Get feedback

Arrange to meet with your workplace coach, mentor or human resources manager to review your professional development plan and get their feedback. The plan should be reviewed and updated at least annually. This review could take place as part of your performance appraisal.

Your coach or mentor, colleagues, a qualified assessor or human resources officer may be able to offer advice on professional development activities that will be useful in achieving your professional goals and objectives.

There are many types of professional development activities you can use to improve your personal performance in providing instruction and demonstration.

### Professional development activities for improving performance

- ▶ Mentoring and coaching with an experienced workplace trainer
- ▶ Professional development activities conducted by a training organisation
- ▶ Participation in online communities of practice
- ▶ An action learning project in the workplace
- ▶ Formal or informal programs of further study and professional reading

#### Example

#### Reflect on your personal performance

Anna is dreading her next performance appraisal. A few weeks ago she volunteered to facilitate a question-and-answer panel at the department's quarterly meeting. Her session plan was designed for the in-house expert panel to take questions from the staff about the methods that could be used to conserve resources and promote sustainability.

For Anna this seemed an innovative way to deliver sustainability training to the staff without having to use her usual technique of delivering a mini-lecture.

Ten minutes into the question-and-answer panel Anna realised she didn't have the skills to manage the group dynamic that was emerging. It seemed that each team thought they were using 'green' work practices and that the rest of the organisation was letting them down. Anna had to stop the session when participants started criticising members of the staff known to have strong views about conservation.

Anna is relieved to learn that Felicity, her department manager and an experienced workplace trainer herself, gathered feedback and listened to a podcast of the session. Felicity notes that although Anna has excellent presentation skills she doesn't have any training or experience as a team leader and therefore isn't sensitive to the 'political' issues that arise in this kind of group discussion.

Felicity suggests to Anna that she consider appropriate training as part of her professional development plan. Felicity also offers to mentor Anna to increase her exposure to a wider range of learning contexts and delivery techniques.

## Activity 18

This learning activity will engage you in reflective practice.

Review the various documents that you have collected in your assessment portfolio and reflect on the formative feedback that you have received from your trainer/ assessor and others as you have progressed through the learner guide. For example, you may have participated in a performance appraisal, a discussion with a 'critical friend', or participated in a community of practice or quality review meeting.

Prepare a professional development plan that records gaps in your performance in providing instruction and demonstration and the strategies you plan to use to address those gaps. Consult with your senior manager or supervisor about the plan, explaining how you reflected on your practice. Record their feedback and advice in a journal, and use it to create a final draft of your plan.

You may prepare your professional development plan using the appropriate form/ template from your workplace or ask your trainer for a sample 'Professional development plan'.

[Click to complete Activity 18](#)

# 4B Maintain, store and secure records

An important part of your role in providing workplace training and instruction is ensuring that data on learners' participation and progress through their learning program is systematically collected, recorded and stored.

As you would expect, the learner will be keen to find out the outcomes of assessment activities and their performance against learning objectives. You will also want to use their records to monitor their progress and as part of your personal performance review.



Other stakeholders, including employers of apprentices and trainees, government departments, funding bodies, specialist support providers and the family and carers of learners may also receive advice on the outcomes of the learning program.

If you facilitate a learning program as part of competency-based training, be aware that RTOs are required to comply with specified standards with respect to maintaining learner records. In other cases, you will follow the organisational standards for record keeping.

## Record-keeping obligations

How learner records are maintained and stored will depend on your own organisation's policies and procedures, but may also be directed by external requirements. Every trainer has some kind of record-keeping obligation. You must understand and comply with organisational policy and procedure, particularly since some records may have quality or legal implications.

Keeping track of all activities in an organisation is crucial. If achievements aren't recorded, workplace supervisors or managers may have difficulty determining what type of training has been done or whether an employee is competent in a particular area. A basic record of the training needs to be kept with information on when, what, how training occurred and who attended. It must be legible and have the dates, names and signatures of the learners who attended, the trainer and the supervisor.

## Trainers employed by RTOs

At a minimum, organisational policies and procedures should meet legislative requirements in relation to privacy and confidentiality. Trainers employed by RTOs must remember that RTOs must also meet the Standards for Registered Training Organisations and/or Education Services for Overseas Students (ESOS) requirements. If your organisation receives government funding to deliver training, the funding agreement may contain specific requirements relating to recording, reporting, maintaining and storing information.

At the start of training, confirm what records you need to maintain and your responsibilities in relation to reporting times and learner access. Consider the importance of accuracy when completing records and the importance of confidentiality and security when storing them.

Records of achievements must be documented and filed appropriately in your organisation's system. In some instances, it is a legal requirement to retain a copy of each progress report and record. In the case of a trainee undertaking training in the workplace, such documents are useful for an audit to verify that training has taken place. Your organisation or employing RTO, an employer or an agency dealing with a learner may require you to complete and maintain additional information and documents.

## Record storage

There are many management systems that can record information about learning programs. The sophistication of the system that you use will reflect your employment situation.

Check with the appropriate person in your organisation to find out about the record-keeping system. You may be required to use an electronic database to record details of participation in the learning program and the outcomes that were achieved. It is most likely that you will also need to include relevant information in the learner's human resources file.

If your workplace has a learning management system, you should make sure you know how to perform the administrative functions available in the system so you can provide support to learners and reports to management as required.

### When recording learner information, ensure that:

- ▶ the organisation's record-keeping policies and procedures are followed
- ▶ the confidentiality of learner's personal details and assessment outcomes is maintained
- ▶ all required data is captured
- ▶ the appropriate documentation format is used; for example, a training record book for apprentices and trainees.

## Privacy and confidentiality considerations

Privacy and confidentiality are significant concerns for all organisations dealing with personal information. Privacy refers to a person's ability to control the access others have to information about themselves, their space and their possessions. Privacy also means how someone with access to sensitive information about others takes steps to avoid embarrassment and humiliation.

Confidentiality is about data or information, not people, and usually refers to managing access to private information. Confidentiality provisions restrict an individual or organisation from using or disclosing information about a person that is outside of the scope for which the information was collected. Confidentiality applies to written, verbal information as well as video and photographs.

### Confidentiality considerations apply to how information is:

- ▶ collected and stored, and for how long it is kept
- ▶ destroyed when it is no longer needed
- ▶ accessed and released to other parties.

## Privacy and confidentiality legislation

Each state and territory has laws that govern privacy and confidentiality, although the guiding principles are similar. Trainers must be familiar with the main points of the legislation that governs the state or territory in which they work. Most states and territories have laws designed to regulate how information is managed in systems such as education and community service. The *Privacy Act 1988* (Cth) also protects all personal information handled by businesses. Most organisations have a privacy policy that is consistent with legislation.

There are 13 Australian Privacy Principles that are requirements when recording or reporting sensitive information under the *Privacy Act 1988* (Cth). Further details about privacy can be found on the Office of the Australian Information Commissioner (OAIC) website at: [www.privacy.gov.au](http://www.privacy.gov.au).

### Key points to remember about privacy

- ▶ Whenever you collect or document information about or from a learner, they have the legal right to view all that has been recorded about them.
- ▶ You must not pass on any information about a learner unless you have their express permission to do so or are required to do so by law.
- ▶ Do not leave notes or records about a learner anywhere where they can be seen or accessed by others.

## Document storage

In order to comply with applicable statutory regulations and your organisation's confidentiality and security policies and procedures, you must ensure that paper and electronic learner records are stored securely. This can mean that documents are filed and locked in a particular cabinet with access given only to designated personnel. If documents are stored on a network, find out whether a password is required for access.

### Example

#### Maintain, store and secure records

Charles is responsible for ensuring that the people in his team complete annual refresher training on their compliance obligations. He delivers the training in conjunction with other team leaders, each of whom instruct in the area of their expertise. An increasing amount of the training is delivered online.

When a team member completes their course assessment, Charles schedules a meeting with them to discuss the outcomes and gather feedback. After each meeting, he checks the assessment report and evaluates the results against benchmarks set by the licensing board and his observations of the training. He analyses the feedback questionnaire to identify any anomalies.

Charles secures the results and feedback by placing each team member's file in the locked filing cabinet for staff records in his office. He also sends a copy of the assessment result to the human resources department where it is recorded on the training database.

These records contribute to the organisation's evidence of maintaining currency of employee skills and knowledge.



## Activity 19

Conduct research in your workplace to complete a table similar to this one about record keeping in your workplace.

Seek information from experienced workplace trainers, human resource personnel or members of the learning development team. Also consult workplace policies and procedures.

Complete the table with details of the procedures used in your workplace to maintain, store and secure learner records.

Record-keeping considerations	In my workplace ...
Types of training record held	
Personnel responsible for creating and updating records	
Procedure for checking accuracy and currency of learner records	
Personnel responsible for storing and disposing of learner records	
Relevant legislation, regulations or industry requirements	
Retention period and disposal procedures	
Security measures	

[Click to complete Activity 19](#)

## Summary

1. Trainers should regularly review their performance, using feedback and personal reflection to identify areas for improvement and development.
2. In a professional development plan, a trainer identifies their goals, establishes a time line and specifies how they will improve their skills or knowledge.
3. Workplaces require accurate and accessible training records for quality improvement, staff development, WHS and legal reasons.
4. The guidelines for maintaining and storing learner records are set out in organisational policies and procedures, as well as being directed by external requirements such as privacy legislation.

