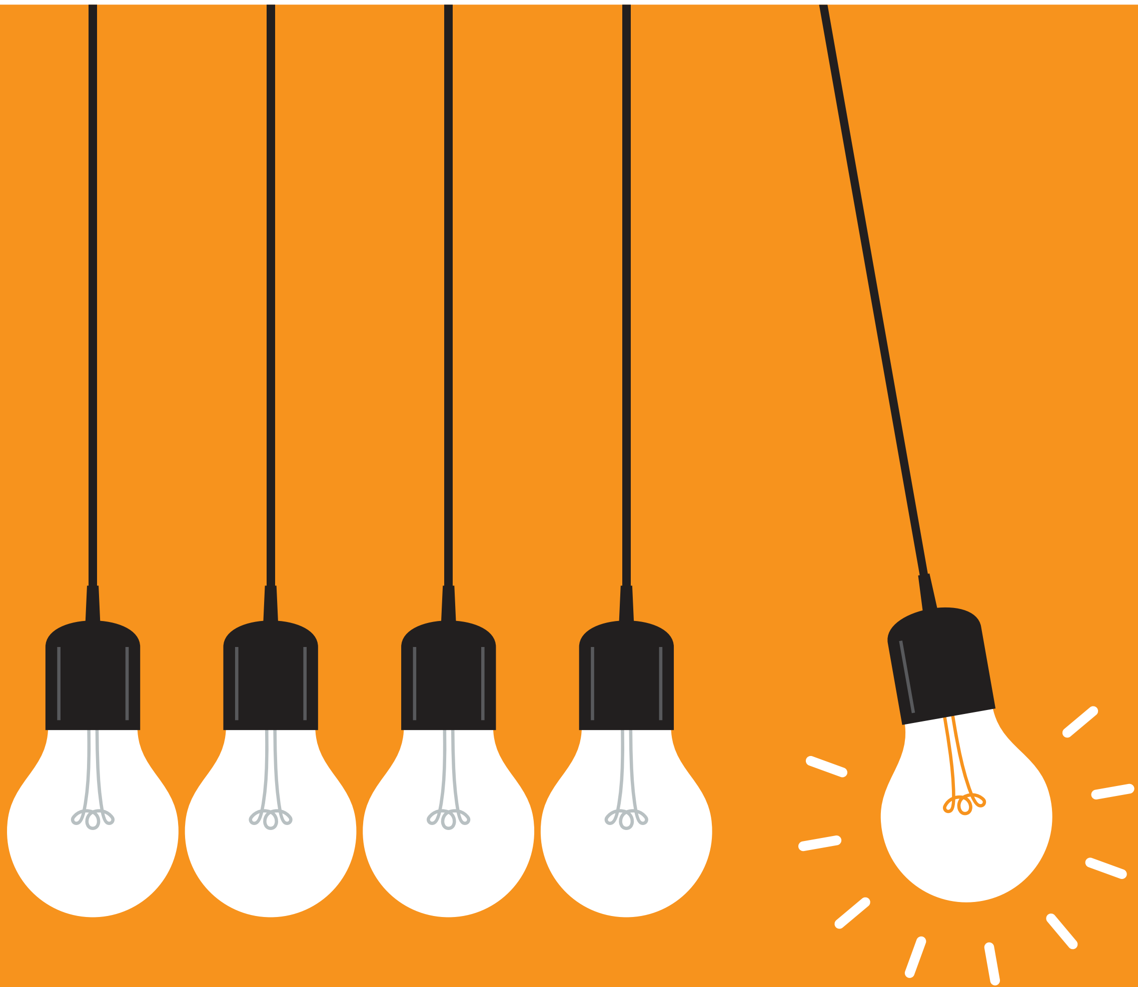
TAEDEL401
Plan, organise and deliver group-based learning

Release 2



Learner guide

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TAEDEL401

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Release 2

Learner guide

Aspire Version 1.3

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Version control and modification history

Version	Release date	Modification
Release 1, version 1.1	January 2017	First release
Release 2, version 1.2	April 2017	Updated to Release 2
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TAEDEL401 Plan, organise and deliver group-based learning

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Contents

Before you begin

This learner guide is based on the unit of competency *TAEDEL401 Plan, organise and deliver group-based learning*, Release 2. 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.

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
Overview	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.
Introduction	The introduction covers the key concepts relevant to this particular unit of competency, including the terminology that will be used throughout this learner guide.
Learning content	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.
Templates	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 *Trainer's and assessor's* guide for this unit.
Examples	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.
Activities	Activities give you the opportunity to put your skills and knowledge into action. Your trainer will tell you which activities to complete.
Summary	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.

Foundation skill area	Foundation skill description
Reading	▶ Accesses, reads and interprets documentation relevant to the learning context, including program documents, learning materials, policies and procedures relevant to the context
Writing	▶ Develops and maintains workplace documentation accurately and in response to required needs
Oral communication	▶ Uses communication techniques to build rapport and explore requirements ▶ Facilitates training in an appropriate style for both individuals and groups
Navigate the world of work	▶ Recognises and follows organisational protocols, policies and procedures relevant to own role
Interact with others	▶ Cooperates and collaborates with others as part of routine activities to achieve team results, and to confirm that outcomes meet requirements ▶ Recognises inappropriate behaviours and the potential for conflict, and implements strategies to maintain an appropriate learning environment
Get the work done	▶ Organises and completes work according to defined requirements, taking responsibility for decisions and sequencing tasks to achieve efficient outcomes ▶ Identifies and responds to problems and opportunities for improvement and considers options for different approaches ▶ Uses information and communications technology (ICT) based tools to access, organise, analyse and display information relevant to role

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 Interpret learning environment and delivery requirements	1.1 Access, read, and interpret learning program documentation to determine delivery requirements	☐ Confident ☐ Basic understanding ☐ Not confident
	1.2 Use available information and documentation to identify group and individual learner needs, and learner characteristics	☐ Confident ☐ Basic understanding ☐ Not confident
	1.3 Identify and assess constraints and risks to delivery	☐ Confident ☐ Basic understanding ☐ Not confident
	1.4 Confirm personal role and responsibilities in planning and delivering training with relevant personnel	☐ Confident ☐ Basic understanding ☐ Not confident
Topic 2 Prepare session plans	2.1 Refine existing learning objectives according to program requirements and specific needs of individual learners	☐ Confident ☐ Basic understanding ☐ Not confident
	2.2 Develop session plans and document these plans for each segment of the learning program	☐ Confident ☐ Basic understanding ☐ Not confident
	2.3 Use knowledge of learning principles and theories to generate ideas for managing session delivery	☐ Confident ☐ Basic understanding ☐ Not confident
Topic 3 Prepare resources for delivery	3.1 Contextualise learning materials to meet the needs of the specific learner group	☐ Confident ☐ Basic understanding ☐ Not confident
	3.2 Finalise learning materials and organise facility, technology and equipment needs in time for delivery of learning sessions	☐ Confident ☐ Basic understanding ☐ Not confident
	3.3 Confirm overall delivery arrangements with relevant personnel	☐ Confident ☐ Basic understanding ☐ Not confident

Topic	Key outcomes	Rate your confidence in each section
Topic 4 Deliver and facilitate training sessions	4.1 Conduct each session according to the session plan, modified where appropriate to meet learner needs	☐ Confident ☐ Basic understanding ☐ Not confident
	4.2 Use the diversity of the group as another resource to support learning	☐ Confident ☐ Basic understanding ☐ Not confident
	4.3 Employ a range of delivery methods to optimise learner experiences	☐ Confident ☐ Basic understanding ☐ Not confident
	4.4 Demonstrate effective facilitation skills to ensure effective participation and group management	☐ Confident ☐ Basic understanding ☐ Not confident
Topic 5 Support and monitor learning	5.1 Monitor and document learner progress to ensure outcomes are being achieved, and individual learner needs are being met	☐ Confident ☐ Basic understanding ☐ Not confident
	5.2 Make adjustments to the delivery sessions to reflect specific needs and circumstances	☐ Confident ☐ Basic understanding ☐ Not confident
	5.3 Manage inappropriate behaviour to ensure that learning can take place	☐ Confident ☐ Basic understanding ☐ Not confident
	5.4 Maintain and store learner records according to organisational requirements	☐ Confident ☐ Basic understanding ☐ 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:

- facilitating group-based learning by preparing and delivering at least three training sessions, including:
  - at least two consecutive sessions of at least 40 minutes' duration that follow one of the learning program designs to a learner group of at least eight individuals
  - at least one session delivered to a learner group of at least eight individuals, with evidence of how the characteristics and needs of this group were addressed
- identifying and responding to individual needs
- accessing and using documented resources, and any support personnel required to guide inclusive practices.

You will also need to demonstrate knowledge of:

- learning theories and principles
- resources available to identify different learner styles
- the relevant industry area and subject matter of the delivery
- the learner group profile, including characteristics and needs of individual learners in the group
- the requirements of the learning program and/or delivery plan, and the content purpose
- different delivery methods and techniques appropriate to face-to-face group delivery
- different techniques for the recognition and resolution of inappropriate behaviours
- behaviours that may indicate learner difficulties, and the methods used to address these difficulties
- the purpose of organisational record-management systems and reporting requirements
- evaluation and revision techniques used to improve session plans
- specific resources, equipment and support services available for learners with special needs
- assessment and risk control measures relating to the facilitation of group-based learning
- policies and procedures relevant to the 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.

Component feature	What it relates to
Unit of competency	
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.
Assessment requirements	
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.

Component feature	What it relates to
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.

Dimensions of competency	Meaning
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

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

Plan, organise and deliver group-based learning

Most cultures value learning, and society generally recognises that people with a range of skills and knowledge are better able to contribute to the social and economic life of the communities they belong to.

Being able to lead the learning of others is a vital skill. 'Training' is a commonly used word, including in this learner guide, but in a sense it is a loaded word; training belongs to the trainer. It is probably better to think in terms of 'learning', which belongs to the learner.

Delivering training, and facilitating group and individual learning requires that a trainer/facilitator has the knowledge, skills and behaviours that enhance learning in others. Effective trainers and facilitators prepare, guide, support and manage learners using a range of methods. Effective trainers and facilitators also have the skills and knowledge to manage learner interactions within the group.

Successfully planning, organising and delivering learning to groups and individuals within a group follows some fundamental steps. The context of this group learning may vary, but the process is essentially the same regardless of whether the group learning is being facilitated in a registered training organisation (RTO), a workplace or a community venue.

Within the vocational education and training (VET) system, training and learning is competency-based. A trainer or facilitator can expect to structure group learning around a learning program or broad training strategy that can be contextualised to the needs of a group of learners. Training packages and units of competency provide an outcomes-based framework for developing learning plans and identifying how, when and who will deliver the learning sessions, while individual session plans provide the specific content and resource details.

The VET system also demands that trainers meet legal and ethical obligations to ensure that no one is disadvantaged because of their age, gender, language, literacy and numeracy abilities, or cultural background.

What this unit covers

This unit of competency, *TAEDEL401 Plan, organise and deliver group-based learning*, describes the skills and knowledge you need to plan, organise and deliver training for individuals in a group learning situation.

The unit of competency applies to trainers and facilitators who structure learning around an existing learning program in a training and assessment organisation.

Your job role

This learner guide will assist you to develop the competence required to plan, organise and deliver group-based learning in different environments and contexts. For example, you may be employed:

- You may be employed as a trainer (and/or assessor) in an RTO that provides training and assessment to learners who wish to gain nationally recognised qualifications. You may deliver and assess training to multiple groups of learners who are enrolled in various courses. This type of training and assessing usually occurs in a group environment, such as a classroom or, increasingly, as blended learning using various online technologies.
- You may be employed by an RTO and asked to train learners in a workplace that is not registered to provide national qualifications. The training and later assessment is the responsibility of the RTO but may be managed in consultation with the workplace.
- 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 and assess workers in various sections of the organisation.

Training and assessment strategy

This unit of competency is suitable for those working for an organisation, such as an RTO, that already has an assessment strategy in place. This strategy should provide details of how assessments should be created, conducted and reported.

If you are working for an RTO, you need to understand and follow their assessment strategy and the scope of their registration, i.e. the qualifications they are permitted to deliver and assess. In order to comply with the VET Quality Framework (VQF)/Australian Quality Training Framework (AQTF) requirements, RTOs must develop a training and assessment strategy for the training programs they deliver that:

- meets the requirements of the training package, including language, literacy and numeracy (LLN) requirements
- meets the needs of particular target groups
- provides learning pathways
- reflects input from industry and other relevant stakeholders to ensure the strategy meets current industry requirements
- documents information according to VQF/AQTF audit requirements.

What you will learn

In this learner guide you will learn how to:

- interpret the learning environment and delivery requirements
- prepare session plans
- prepare resources for delivery
- deliver and facilitate training sessions
- support and monitor learning.

Essential learning points

The information in this learner guide requires an understanding of the following concepts and issues.

Learning program documentation

You need to identify, access and understand the learning program documentation that tells you what is to be covered, and how, when and where the content is to be covered. Learning program documentation could be a delivery and assessment strategy, a learning program or a learning/delivery plan that tells you about:

- learning outcomes or other benchmarks to be achieved
- the content to be covered
- the number of sessions required and delivery methods you should use
- learning resources you will require
- assessment requirements.

With this information at hand, you are in a position to develop session plans.

Session plans

A session plan is a detailed translation of a generic delivery plan, taking broad details and creating a client-specific, step-by-step map of how a specific training session is to be delivered. Each session a plan should detail:

- the objectives and content
- delivery methods and time lines, learning activities, materials and resources
- assessment details.

You will then be in a position to deliver and facilitate training sessions, and support and monitor learning, including managing group interactions and acknowledging access and equity requirements.

Managing groups

As a trainer, you need to develop a range of skills that allow you to facilitate the group so that effective learning can take place. Facilitating groups means being able to ensure effective participation by members, using the diversity of the group as a resource to support learning and use different delivery methods to optimise the learner's experience. Effective facilitating also means supporting and monitoring the learner by making adjustments that reflects their specific needs and circumstances as well as managing inappropriate behaviour such as insensitive language or non-compliance with safety requirements.

Access and equity issues

Access and equity issues are important in a learning situation. Learners must have access to an environment that does not discriminate on any basis or cause offence through cultural or language misunderstandings. You need the skills and knowledge necessary to ensure that the learning process reflects the needs of particular target groups, such as people with disabilities, Aboriginal and Torres Strait Islander people, women and people with a language background other than English.

Considerations when responding to diversity include:

- developing a profile for each candidate
- identifying where they will need support
- contextualising learning to suit learner needs and characteristics.

Topic 1

In this topic you will learn how to:

1A Use learning program documentation to determine delivery requirements

1B Identify group and individual learner needs and characteristics

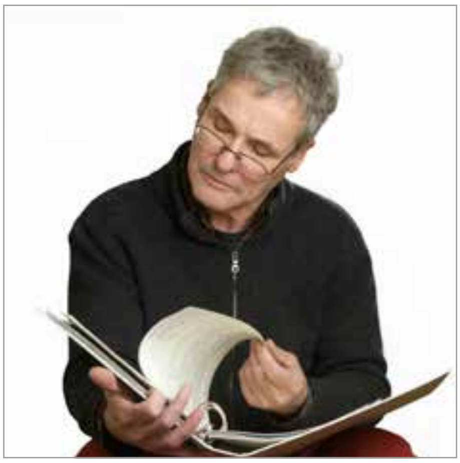
1C Identify and assess constraints and risks to delivery

1D Confirm your role and responsibilities to plan and deliver training

Interpret learning environment and delivery requirements

The role of a trainer/facilitator is varied, and can involve one or more aspects of planning, organising and delivering training. The first step in the successful delivery of a training program is the planning stage, which involves understanding the boundaries and requirements for training. The planning stage is necessary to ensure learners achieve the outcomes the program is designed to address.

1A Use learning program documentation to determine delivery requirements



Your training organisation will have developed overall training and assessment strategies that are designed to deliver a qualification or course. A learning program is a subcomponent of the training and assessment strategy, and provides detail of the purpose of the program and what is going to occur in the learning process.

Before you can prepare and deliver training sessions for a group of learners, you need to locate the training and assessment strategies submitted by your RTO as part of their registration to deliver qualifications from a training package. You need to make sure this learning program meets the needs of the learner group you are leading, and make adjustments if necessary. Using the learning program, you will be able to gather learning resources, plan sessions and decide on teaching strategies suitable for your group to meet the learning outcomes that match the units of competency. You will most likely work with colleagues on the plan to make sure all aspects of the training plan are covered and coordinated.

Knowing where this information is located and understanding its implications for training ensures that you address delivery requirements and learning outcomes.

Learning programs

A learning program documentation links the needs of the learners with desired learning outcomes. In effect, a learning need is identified and a learning program and associated plans are developed that outline how the learning need will be addressed. Your role may be to train someone in a skill, or to facilitate development of a skill; in either case, your role as a trainer is to contribute to addressing identified learning needs, and also to interpret and use learning program documentation.

In an RTO context, a learning program may be used to develop learning/training plans that outline in detail how learning is to be organised for specific parts of the program.

Learning delivery may be through:

- workplace learning
- face-to-face delivery
- online delivery
- a blend of all three delivery modes.

Learning plans and training plans

A learning plan should recommend the appropriate mode of training and address the needs of learners. Where the mode of instruction is through group learning, the learning plan needs to outline in detail how, when and who will deliver the learning sessions. The learning plan can then be used as the basis of developing your day-to-day planning to deliver the qualification. Different trainers may deliver particular parts of the learning program, especially when an apprentice or trainee qualification is involved, so it is important that there is a learning plan or training plan that coordinates training activity and addresses learning needs.

A training plan is similar to a learning plan, but is also a requirement for providing training to an apprentice or trainee. Other differences between a learning plan and a training plan are that learning plans can be for groups or individuals, whereas training plans are only for individuals; and that only training plans address assessment. Both can be individualised to suit the learner. If the learner is an apprentice or trainee, they must use the training plan template from their state training authority. Ask your trainer for a sample 'Training plan' template. (Note: this is a generic document and should not be used by apprentices or trainees.) Aspire has included relevant templates in the *Trainer's and assessor's guide* for this unit.

Learning needs

An individual may be employed or seeking work in a role within an industry. They may have their own business or aim to have one in the future.

A learning need in a workplace or industry context may be the result of:

Skills gap

- An organisation identifying that one or more of its employees needs training to adequately perform their existing or potential future duties.

Changed industry requirements

- Industry identifying that the pathway for employment into that industry or sector requires certain skills and knowledge that have been packaged into a structure leading to formal qualifications.

Develop a learning program

Once a training need has been identified a learning program is developed. Learning programs are designed and developed by the RTO to provide a learning experience to achieve competence. Competence is a judgment against a specific set of criteria. This may be to achieve a specific purpose, perhaps as a discrete program to meet an identified need; for example, learners in a particular workplace requiring work health and safety (WHS) training to meet legislative, licensing or organisational requirements. Alternatively, a learning program may form part of a broader strategy to deliver a nationally recognised qualification using a training package.

The learning program needs to address how the learner will develop the applicable knowledge and skills, and how they will be able to apply them in a workplace.

Examples of learning programs are:

- training, development or up-skilling of workers by an employer
- a program established for a traineeship
- an organisation's induction program
- a vocational program delivered by a TAFE institute or other registered training provider
- a community education program.

Learning program documentation

As a trainer, it is generally not your role to develop and design learning programs – this is the role of the program manager. The unit of competency TAEDES401 Design and develop learning programs addresses the skills and knowledge required to do this. As a trainer, it is your role to organise and deliver training that addresses the needs of stakeholders, revising and adjusting the training as needed.

A learning program provides you with:

- detail about the objectives of training and assessment
- the vocational knowledge, skills or competencies that learners are supported to achieve
- a profile of the learners and their needs
- suggestions for assessment methods
- information allowing you to identify the content, sequence and structure of learning so you can develop a delivery plan and session plan/s.

Learning program documentation provides you with the background information you need to help you to develop session plan/s, which will then guide delivering training.

The learning program documentation may include information on:

- training product details and qualification packaging requirements
- trainer and assessor competencies
- target learner group characteristics
- dates, modes of delivery and the duration of the program
- learning approaches or styles that suit the identified needs of learners
- recognition of prior learning (RPL) information
- schedule and timing for subject matter in line with requirements
- details of assessment, including methods/tools and specific details for workplaces
- subject matter content that you have researched, developed and documented, according to agreed design options
- training and assessment materials
- tools and equipment.

Review learning program documentation

You need to review all relevant learning program documentation as this generally provides the information you need to determine and/or confirm the training, learning and assessment requirements. If it is an existing program, confirm that any requirements have not changed since the program was developed or last delivered.

Reviewing the learning program will also help you identify any skill areas you may need to develop; for example, learning how to use a data projector or electronic whiteboard.

The learning program or delivery plan helps you to:

- develop session plans that address key learning areas
- use different delivery methods and techniques to best meet learners' needs
- ensure you have sourced any special facilities, equipment or other resources that are required.

The learning program is likely to consist of a series of documents. In addition to the information already listed, documents will ordinarily provide information regarding:

- units of competency and/or other benchmarks
- content and timing/delivery points
- WHS considerations
- required human and physical resources.

Competencies and benchmarks

Benchmarks are the standards by which training outcomes can be measured. Learning may be framed by a national training package unit of competency, or the benchmarks of a learning program may be aligned to enterprise standard operating procedures, quality requirements or product standards. In some instances, learning requirements may also be established by an Australian Standard or an international Standard (ISO Standard).

Ensure you consider the industry area and subject when planning and delivering training. All work must be conducted in line with legislation. Ensure you comply with relevant WHS laws, regulations, codes of practice, standards and licence requirements that been developed to protect workers, clients and consumers.

Industry knowledge is continuously improving and training should reflect industry best practice.

Units of competency may be used in training across different industries that have different and demanding safe operating procedures (SOPs).

Here is further information about units of competency, SOPs and Standards.

Training package unit of competency

Units of competency provide a framework for establishing the outcomes required of training and assessment. For example, this unit, *TAEDEL401 Plan, organise and deliver group-based learning*, describes the skills and knowledge a person must demonstrate to be ‘competent’ in planning, organising and delivering training to people in a group.

When analysing a unit of competency to identify delivery requirements, look at the whole unit to form a picture of the kind of skills and knowledge required, and the contexts to which they apply. You can then infer the type of delivery arrangements you need to put in place. You may also need to refer to the training package the unit is drawn from to confirm any other requirements.

A unit of competency often applies broadly across an industry sector.

Please refer to the overview section of your learner guide for a more detailed outline of the components of a unit of competency.

Safe operating procedures (SOPs)

Enterprise or industry standards and benchmarks may describe quite clearly the kind of knowledge, skills, safety and quality requirements a particular task or role demands. Safe operating procedures (SOPs) are the instructions and methods for safely and efficiently carrying out a particular task to meet defined outcomes. Many organisations use SOPs as a basis for determining training needs.

The learning program may have been developed to address learning needs relating to the organisation's SOPs. If this is the case, you need to be familiar with any relevant SOPs and related policies.

Australian and international Standards

Standards that provide international consistency have been developed by the International Organization for Standardization (ISO). If the learning program is aligned to an Australian or ISO standard, make sure you understand the requirements of the standard, and ensure that the learning program addresses these requirements.

Assessment requirements

Units of competency specify the assessment requirements you must follow. The assessment requirements of streamlined training packages include performance evidence and knowledge evidence requirements, and adherence to the specified assessment conditions.

To find out more about the assessment requirements for a unit of competency, refer to the unit of competency itself. The relevant companion volume implementation guide provides additional advice about making reasonable adjustments to assessment requirements for candidates and information about licencing requirements, where applicable.

If you are required to plan, organise and deliver training that addresses a particular need in an organisation, you need to know about the assessment criteria. This information should also be in the learning program documentation. You may also need to know when or where will occur, and what assessment methods and tools you are required to use.

In some circumstances a learner may already have some or all of the skills described in the learning program. In these instances you may be required to help a person identify the opportunity to apply for RPL.

Work health and safety

As a trainer/assessor, you have a duty of care to your learners and all those you interact with during the course of your duties, irrespective of where your duties are performed. This means that you must apply and/or obey all WHS policies and procedures relevant to the learning environment. You must ensure that both you and the learners you are responsible for do not do anything that creates a risk to the health and safety of others in the workplace or learning environment.

Learning program documentation often includes specific WHS issues to be addressed in delivery; for example, whether personal protective equipment, such as safety glasses or and high-visibility vests, is needed by you or the learners.

In addition, learning program documentation may provide information regarding access, safe use and maintenance of equipment, how to report hazards and emergency procedures to be followed. These may be specific to the organisation you are employed by, the client organisation or a supplier.

Refer to documentation that provides advice regarding any particular WHS issues to be addressed in delivering training, as well as information on where to access copies of relevant legislation, regulations, codes of practice and Standards.

Example

Use learning program documentation to determine delivery requirements

Melanie is a trainer in a private RTO. She is asked to deliver training on behalf of a new client, an employment services provider. Melanie is given the formal delivery contract and asked to plan, organise and deliver the training. She looks at the training and assessment strategy document to see how the training and assessments should be created, conducted and reported.

She notes the following information:

- The learners are long-term unemployed who have expressed an interest in working in IT.
- There will be 10 sessions of three hours each, which will be conducted in a trainer-led classroom situation with provision for self-paced learning.
- Learners will be undertaking only three units from ICT10115 Certificate I in Information, Digital Media and Technology:
  - *ICTICT101 Operate a personal computer*
  - *ICTICT102 Operate word-processing applications*
  - *ICTICT103 Use, communicate and search securely on the internet*.
- A series of workbooks with supplementary challenge tasks and online resources are available for learners.
- A statement of attainment will be issued to learners who satisfactorily complete the training.

Melanie downloads the relevant training package (the ICT Information and Communications Technology Training Package) from the national register website (http://training.gov.au) and prints copies of each unit of competency.

She reads each unit of competency to make sure she understands exactly what skills and knowledge the learners must demonstrate to successfully complete the units. Melanie has not previously delivered at Certificate I level, so she checks with her manager, who suggests she read the AQF implementation guidelines to get a feel for the difference between the standards for Certificate I and Certificate II qualifications.

Melanie also reviews the training materials and confirms that they have been written specifically for the units of competency she has to deliver. She notes that the content is up to date – this is a particular concern for her because technology changes so rapidly and she wants to make sure the material is still current. Melanie also checks the versions of the software and the condition of the computer hardware she will be using, and ensures there are enough for the number of learners she be training.

In her induction of the learners, Melanie will cover WHS from the RTO's perspective and according to the requirements of the unit of competency.

Activity 1

1. Access and review a training package that is relevant to the industry you currently work in, or one in which you have expertise. Explain why the training package you have chosen is relevant to your industry.

2. Download a unit of competency from a particular qualification and explain how each relates to your industry area.

3. Explain what information the unit of competency provides you with and your obligations if you were to deliver this unit.

4. What other learning program documentation might you need to see to be able to establish delivery requirements for this unit?

5. Are there WHS requirements or other benchmarks you need to meet? If so, what are they and where can you find them?

6. Describe the delivery requirements you believe this unit demands.

Click to complete Activity 1

1B Identify group and individual learner needs and characteristics

Your role as a trainer or facilitator requires you to ensure learners are provided with every opportunity to attain the skills and knowledge relevant to the outcomes of the training they are participating in. To do this effectively, you will need to learn as much as you can about individual learners and the group. This might include taking into account:

- any social and cultural issues that may affect learning
- background issues, such as the learners' past experiences of learning and education
- language and literacy levels to consider.

It is useful to collect information regarding your learners in a structured way; for example, by using a learner profile matrix. This helps you to analyse the information you collect, and any requests for additional support or resources required to meet the learner needs you have identified.

Armed with a profile of the learners, you can then apply appropriate learning styles and theories to training delivery. You'll also be able to identify the kind of presentation skills you might need to be aware of, such as your rate of speech, voice tone and the kind of language you use. A good knowledge of the group you're working with may also help you plan out your delivery strategies and allow for predictable contingencies that may arise.

Individual characteristics and needs

Try to find out as much as you can about the learners you will be training. Addressing individual characteristics and needs during the planning stage will help you provide a better learning experience at the individual and group level.

Being aware of learner characteristics may help you to identify delivery methods and techniques appropriate to individuals or the group. Some characteristics may lead you to seek advice and support from specialists; for example, language, literacy and numeracy (LLN) specialists or organisations with expertise in working with different cultures or with learners who have special needs.

The following table lists some different learner characteristics you might identify with and suggestions about how you might plan, organise and deliver a training session or otherwise support the learner.

Planning and delivery strategy

If a learner does not have the prerequisite LLN skills needed to undertake the level of training, you could:

- refer them to LLN support within your own organisation or another organisation
- adjust learning activities; for example:
  - ensure there are group activities where learners with different skill levels learn from each other
  - develop posters where new words/terms are explained in simple English, perhaps accompanied by a picture.

Physical/psychological needs

To accommodate specific needs, you might:

- request the support of an aid, such as a scribe
- determine whether any adaptive technology is required
- ensure that any special equipment is available
- ensure that there is appropriate access to the learning environment and facilities.

Different learning styles

Adapt delivery strategies to:

- ensure there is a variety of different learning activities and delivery methods
- give learners options to choose from in terms of how they complete learning and assessment activities.

Employment status or industry background

To add relevance to the learning program, you might:

- provide learning activities that are relevant to learners; for example, if you are delivering word processing training to job seekers, you could link résumé preparation with developing keyboard skills
- use language appropriate to the learners' background; for example, terminology relevant to the industry in which they are working or seeking employment.

Past learning experiences

To draw on past learning experience:

- find out about learners' past experiences and design activities that ask them to draw on this experience
- ask more experienced learners to demonstrate tasks and skills to others.

Level of maturity

To acknowledge learner maturity, you could:

- design learning activities that accommodate each learner's level of maturity; for example, recognise that middle-aged learners may not be interested in the same activities as teenager learners
- organise learning to allow sufficient breaks for learners who may have a short attention span.

Cultural background and needs

To accommodate learners' cultural backgrounds, you might:

- investigate and learn more about the learners' cultural backgrounds to ensure you understand the difference in terms of communication, body language, male/female interactions, and differences in terminology
- adjust session delivery to allow learners to attend to spiritual needs; for example, prayer times
- use activities that will encourage learners from a background of rote learning to practise skills in questioning and being responsible for their own learning

Level of formal schooling in Australia or overseas

To acknowledge different experiences of learning and education, you might:

- reassure learners that learning is obtained from life experiences and informal learning, not from formal schooling alone
- remain aware that learners have acquired certain knowledge/skills
- be aware that learners may have gaps in their learning skills and may benefit from encouragement to develop these; for example, by keeping their own vocabulary list.

Time spent in Australia

To cater to learners who have not spent much time in Australia, you should:

- avoid Australian slang/colloquialisms
- explain some facts about Australia rather than assuming learners have knowledge of these.

Meet group needs

Planning to deliver group-based training may involve some additional preparatory considerations. Depending on the group and context of training, all or some of the following skills may be important.

Skills for group training include:

- understanding how to manage group dynamics
- being able to recognise and address specific needs of the individuals that make up the group
- using the knowledge and skills of the group as a resource to support learning
- being able to identify and interpret behaviour that puts others at risk
- understanding how to facilitate group discussion and interaction.

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. Your delivery style and facilitation skills might also be determined by this information.

The individuals within groups are likely to have a broad mix of characteristics that you need to plan for. Strategies to address the diverse needs of individuals within these groups should be developed and implemented to ensure all learners benefit from the training and interaction with others in the group. Remember that you want the learning experience to be positive and engaging for all participants, so you need to plan delivery that addresses their needs and acknowledges particular characteristics of the learner group.

Examples of potential groups can include:

- existing (or new) employees in an organisation
- school leavers and at-risk youth
- learners with special needs or requirements; for example, people who have a disability, learners who are recent migrants or people with an Indigenous background
- overseas learners who have come to Australia to undertake training
- learners who are seeking to upskill themselves; for example, in preparation for a new role, promotion or career change – this could be in a TAFE or other training provider setting
- long-term unemployed people seeking entry into the workforce.

Identify learner needs

Identify the needs of different learners by referring to documentation.

Documentation that may help you uncover learner characteristics and needs includes:

- learner enrolment forms
- employment records
- training needs analyses
- written or verbal reports from supervisors, case workers and others who are supporting learner entry into the training.

When handling and reviewing personal information about learners, be mindful that as a trainer you have ethical obligations in relation to what you do with that information and how you use it. You must also adhere to your organisation's privacy and confidentiality policy; generally, this policy will mirror the requirements of privacy legislation.

Learner enrolment documentation

Learner enrolment documentation (particularly that related to enrolment in a nationally recognised qualification via an RTO) may provide a valuable insight into learner background and characteristics that assist you when developing session plans.

The information on the learner's enrolment form may help you to gauge the level of support the learners are likely to need, indications of their possible motivation for learning, and determine how homogeneous the group is. In certain circumstances, such as when a learner has a disability or language barrier, you or your employer may need to make special support arrangements for that person.

Enrolment details usually include:

- age details
- ethnicity, language and cultural diversity
- disability
- LLN assessment
- schooling
- previous qualification/s achieved
- employment history
- reason/s for enrolment.

Employee records

If you are preparing to deliver learning to a group in their workplace, employment records and reports can provide a profile of learners, revealing information such as:

Information in employee records
Human resources (HR) records The following types of HR records can be useful in establishing existing skills and knowledge: ▶ length of employment service ▶ classification or training undertaken.
Current role within the organisation A position description can tell you much about existing skills and knowledge.

Training needs analysis

Learning programs delivered in a workplace may be based on a training needs analysis (TNA) that has been used to establish the needs of learners. A TNA identifies any gaps between an employee's current skills and knowledge, and those required by the unit of competency. A TNA can also be used to identify knowledge and skills gaps for a work group or business unit within an organisation.

To learn more about what is covered in a TNA, ask your trainer for a sample 'Training needs analysis questionnaire'.

A TNA can provide very detailed information regarding identified skills or knowledge needs, as well as the following types of information.

A TNA can also provide information regarding a learner's:

- education level or work skills
- diversity factors, such as language and/or cultural differences
- attitude or reaction to the training.

Reports from supervisors, case workers and others

When learners have been recommended to undertake training by their workplace supervisor or a case worker from a support group, reports from and discussions with the referring person can provide key information about learner characteristics and needs, as well as information about skills gaps, workplace processes and plans, and organisational needs.

Example

Identify group and individual learner needs and characteristics

Sanjay is a learning and development specialist in a large organisation. He is asked to deliver the organisation's induction training to a group of 15 new employees. The induction training lasts for three days and covers organisational policies, procedures and systems.

Sanjay is familiar with the program and already knows the content to be delivered. He is interested to know more about the new employees so he can better prepare for training delivery. Sanjay contacts the HR department, which informs him that while they are unable to provide employee personnel records due to privacy and confidentiality considerations and organisational policies and procedures, they can meet with him to provide as much information as they can.

Sanjay and a HR officer are able to populate a learner profile matrix that will help him determine the different characteristics of learners within the group. It will assist them to take the group and individual learner needs and characteristics into consideration when preparing for training delivery.

Learners: new employees attending induction training for the IT department				
Learner profile matrix				
	Learner 1	**Learner 2**	**Learner 3**	**Learner 4**
Age	25	54	48	24
M/F	M	M	F	F
Country of origin	India	Australian	Greece	Philippines
Special needs/ disabilities	No	Yes – wheelchair	No	No
Previous learning/skills and knowledge			Was a health and safety representative in previous company	
Existing qualifications	Diploma in IT	Bachelor of Arts	Nil	Cert IV in Business Studies
Level of literacy/ numeracy	Reading: ACSF 4 Writing: ACSF 4 Numeracy: ACSF 5	Reading: ACSF 5 Writing: ACSF 4 Numeracy: ACSF 3	Reading: ACSF 3 Writing: ACSF 3 Numeracy: ACSF 2	Reading: ACSF 4 Writing: ACSF 3 Numeracy: ACSF 3
Existing IT skill level	Good	Basic	Basic	Good
Preferred learning style	Online Independent	Discussion Reading	Discussion	Online Group work
Other				

After analysing the learner profile matrix, Sanjay makes the following observations:

- There is a range of age groups – the training will need to allow for the different learning preferences of baby boomers, and generations X and Y.
- Gender is evenly spread; however, Sanjay will need to determine how the different cultural backgrounds relate to mixed-gender training. He will ascertain if there are any religious or other days of importance for each learner.
- There is a wheelchair-bound learner – Sanjay will need to discuss with HR what support may be available for the learner; for example, he may need a height-adjustable desk.
- It appears that LLN support is not required. Sanjay will monitor this and seek specialist support or assessment if required.
- Sanjay will need to determine how to manage the diversity in previous formal education – he can assume that those without formal qualifications will learn at a different pace to the others, particularly as there is a wide discrepancy in their IT skills.
- Sanjay will adjust his delivery style to account for the particular needs of different people in the group.

Activity 2

Think about the last course you attended and answer the following questions:

1. What information about you did the trainer have access to before you commenced the training?

2. Where would the trainer have accessed this information?

3. How could this information have helped the trainer identify your learning characteristics/needs?

Click to complete Activity 2

1C Identify and assess constraints and risks to delivery

Constraints and risks are those factors that have or may have an impact on the delivery of training or learning required.

Constraints and risks to delivery should be identified and assessed so that impact minimisation strategies can be developed and taken into consideration when:

- preparing session plans
- preparing resources for delivery
- delivering and facilitating training sessions.

Constraints

A constraint is something that you may already know about, which will affect the successful outcome of the learning program, or at the very least has the potential to affect some aspect of the program.

Here are examples of constraints.

Security issues

- Security issues may arise where training is being conducted in a workplace environment with restricted access; for example, at a Department of Defence site where a security clearance for all training staff may be required.

Access to a work environment

- Lack of access to a work environment to practise learning can be a major constraint given that training package qualifications are based on competency to workplace standards.

Time and cost factors

- The cost and time required for training may result in the need to either condense the training or develop other strategies to address this constraint.

Learners have no vocational experience

- Some learners will have limited knowledge and skills from past work experience, so the trainer will have to use relevant scenarios and video clips to fill in the gaps. This may include school leavers or learners starting out in aged care or childcare.

Respond to constraints

You need to identify constraints and develop suitable strategies to mitigate or work within the constraints.

Tips for responding to constraints
Simulated work environment If access to practice opportunities is a constraint, a simulated work environment, such as in a practice firm, might be considered.
Specialist advice If one or more learners have specific needs, such as for vision impairment, you may need to seek professional advice to develop specialist support strategies, such as the use of adaptive technologies.
Involve those who are concerned Recommended or suggested strategies should be discussed with relevant persons before they are implemented – this includes anyone who is involved with planning and organising the training, and also employer and client representatives. Where strategies are developed for particular learners, those learners should be involved in the decision-making.

Risk control

A risk is a potential problem that may impact learning delivery; while it may not happen, if it does it will have a negative impact on the learning program.

Identifying risks during the planning stage will enable you to assess any potential impact and put strategies in place to minimise the risk or remove it entirely. Part of this process may also include familiarising yourself with emergency procedures, the safe use of equipment and who you report any risks or hazards to.

If your organisation is an RTO, there should be a documented risk assessment plan. You may need to review this plan to identify all relevant risks and associated mitigation plans.

Risks may include:

- The room may have WHS concerns, particularly if you are not able to view the training room prior to delivery.
- You or a learner may fail to comply with WHS legislation and requirements, duty of care obligations or a workplace code of practice.
- If you have not received full and proper briefing, you may be at risk of failing to comply with workplace relations and industrial awards/enterprise agreements.

Example

Identify and assess constraints and risks to delivery

Julia is an in-house trainer in a large financial institution. Her role is to support business units that have identified a training need in their area.

The sales department has asked that refresher sales training is conducted. The particular business unit is a very small specialist unit and Julia has delivered training in them before, so she has a good understanding of what they do, and knows most of the team members reasonably well. Nevertheless, Julie spends some useful planning time reviewing the potential constraints and risks.

Here is an extract of her constraint and risk analysis.

Constraint or risk	Actual or potential impact	Recommended impact minimisation or removal strategy
Risk: One or more learners may not be at work on the day of training.	These learners will not achieve required learning outcomes, so their key performance indicators and business financial results may not be achieved.	Schedule the same session to repeat at different times and on different days so that learners who miss one session can attend the other.
Risk: The business may not release all individuals at one time as this affects customer interaction.	Session numbers will be small (there are only 10 in the whole team), impacting the benefits of group activities.	Develop activities that can be conducted in small groups, such as role-plays.
Constraint: Trainer does not have sufficient specialist knowledge to contextualise training.	Activities will be too generic and not relevant to the learners' work, thus affecting training outcomes.	Seek support from a sales team leader to develop contextualised activities.

Activity 3

Read the following scenario, then complete the task that follows.

Scenario

You have been asked to deliver a learning program consisting of five four-hour sessions to a group of young people aged 15–18. The clients are early school leavers and have been unemployed for at least six months.

You plan for the learners to attend your session each morning for one week, using the afternoon to research and practise what they learnt in the morning's session.

The learning program is based on the unit of competency *CHCECD010 Provide support to people in career transition*, which aims to support learners to plan their career. This is a stand-alone unit. The course will be:

- delivered in three weeks' time
- delivered face-to-face
- facilitator-led
- conducted in your organisation's training room, which has adequate facilities and suitable learning materials.

Download and read the unit of competency *CHCECD010 Provide support to people in career transition*. Identify and assess constraints and risks that may affect delivery. While you do not have specific information regarding these learners, you should be able to make generalisations about individual/group needs and characteristics.

You can use a template similar to the one used in the previous example, your organisation's preferred template or design a different one entirely.

Click to complete Activity 3

1D Confirm your role and responsibilities to plan and deliver training

Your role and requirements as a trainer can be varied. The size, structure and type of organisation you are working in, as well as the client group/s you work with all help shape the exact nature of your role and responsibilities. Even if you are working in the same organisation and role, your responsibilities may change with each training program. It is therefore important to review and clarify your personal role and responsibilities on a regular basis, but particularly when working with a new training program.

For most trainers, your role and responsibilities will be outlined in an employment contract or position description. These are the most obvious and immediate sources of information about role expectations. However, outside of these documents, you can also find other resources that help shape your role.

These references include:

- the VET Quality Framework (VQF)/Australian Quality Training Framework (AQTF)
- relevant government funding agreements
- national training packages
- Education Services for Overseas Students (ESOS)
- legislation for trainers working in an RTO
- your organisation's policies and procedures
- your organisation's contracts with internal or external clients.

Your role and responsibilities

Your employer is responsible for ensuring you have received adequate instruction so that you understand your particular role and responsibilities. Your role in training delivery may change with each new training program, depending on the client, learners and training requirements. Ensure you clarify your role prior to each training program. If you are unsure about any role expectations, you should discuss any concerns with your supervisor, other trainers/facilitators or an employee association representative.

Trainers employed in an RTO have a responsibility to maintain records in accordance with:

- organisational policies
- legislative requirements
- a registering body or any funding body requirements
- client requirements.

Generally, a trainer's role also includes the following responsibilities:

- planning and organising training
- planning and organising learning materials
- consulting with a client to confirm requirements and plans
- providing delivery to meet client needs
- maintaining relationships with other trainers/facilitators
- your ongoing professional development in relation to your role
- ensuring you have the required skills and knowledge to be able to complete your work; for example, planning and organisational skills, time management skills and relevant technology skills.
- ensuring learners meet aspects of assessment
- maintaining contact with and offering support to learners.

Stakeholder matrix

In some projects, details of the stakeholders who are involved are mapped in a matrix. These documents can be quite detailed and complex, so you may need to review them and develop your own smaller versions containing the specific information you require. In smaller projects where these matrices don't exist, it may be beneficial for you to develop them.

A stakeholder matrix identifies the people who need to be engaged or kept informed of the progress and outcomes of the learning program. Stakeholders could include:

- the RTO's administration
- people responsible for booking and/or setting up training rooms
- the person responsible for ensuring that training resources, such as computers and audiovisual equipment, are operational
- the client's key contact person for the learning program, including learners' managers and supervisors.

A simple form of a formal stakeholder matrix is likely to suffice in most instances and look like the following sample.

Name	Name of organisation	Title and role in the organisation	Contact details	Constraints	Notes
John Smith	Casuarina Hardware Store, Darwin	Store manager	Mobile: 0123 456 789 Email: jsmith@abc.com.au Address: 123 Smart Street, CASUARINA NT 0810	On leave 20/12/16 – 1/2/17 Doesn't work Mondays Not available 8am–9am every morning due to staff meetings	Has worked in Casuarina for 10 years, previously at the Darwin branch

Roles and responsibilities matrix

A roles and responsibilities matrix may be developed to help monitor and manage workloads. This matrix will identify all internal and external parties working on the project and their responsibilities. The people listed in this matrix are likely to be the same as in your stakeholder matrix; however, in this particular document there will be more detail about their responsibilities.

You may not need to construct a formal or complex roles and responsibilities matrix; something similar to the following sample is likely to suffice.

Name	Name of organisation	Title/ role	Contact details	Responsibilities
Alexis Teng	Casuarina Hardware Inc	National trainer	Mobile: 0234 546 789 Email: ateng@rto.com.au Address: 330 Clever Street, Melbourne Vic. 3000	▶ Advises store manager if agreed training sessions need to be rescheduled. ▶ Advises store manager if unable to commence sessions on time. ▶ Meets with store manager at the end of each session for 30 minutes to: – provide attendance register – review session feedback from learners – review learner progress – review content of most recent session – review content of next session.
John Smith	Casuarina Hardware Store, Darwin	Store manager	Mobile: 1234 456 789 Email: jsmith@abc.com.au Address: 123 Smart Street, CASUARINA NT 0810	▶ Advises trainer if agreed training sessions need to be rescheduled. ▶ Nominates a subject matter expert for each training session. ▶ Meets with trainer for 30 minutes after each training session.

Plan and organise training

Planning and organising training can be quite simple or very complex, depending on the number of learners involved and their location/s. Imagine planning and organising training for an organisation with staff who are regionally dispersed. You would need to work with managers at each site to ensure they are actively engaged. You would also need to be clear about your role and responsibilities, and what is expected of the managers. Also consider the logistical arrangements you may need to make, and the likely delivery modes you might want to employ to facilitate an effective learning program.

Example

Confirm your role and responsibilities to plan and deliver training

An RTO has won a contract to deliver Certificate III in Hospitality training to employees in a hotel chain. The RTO employs a trainer, Catrina, for this task. Catrina has extensive experience in training in the learning and development department of a large hotel chain. However, she has very little experience working in RTOs.

Although Catrina holds a Certificate IV in Training and Assessment, she is a bit bewildered by how the RTO works and what her specific role and responsibilities are. Her induction into the RTO is reasonably comprehensive, but it is too much information to take in at once. Her manager is very busy and is not always available to answer her queries. Her manager nominates a support person to be her mentor and meet with her on a regular basis until she is comfortable with her role and responsibilities. The support person also helps Catrina to become familiar with the operations of the RTO.

Catrina reads through the training and assessment strategy and the RTO's policies and procedures manual, and reviews the RTO student handbook. She also accesses session plans that she has used in previous training and has an example of a previous course run by a colleague who delivered training to a similar target group.

She starts planning for the delivery of training to the hotel chain so she can use the time with her mentor to confirm that she is on the right track.

Based on her discussions and planning, Catrina drafts a stakeholder matrix and a roles and responsibilities matrix, and discusses these with her mentor. Once she feels confident about her role and responsibilities in relation to her employer and the learning program, Catrina organises a meeting with the client to clarify her role and expectations, and to ensure that these align with the client's understanding. She also confirms with the client who her main contacts in the client's organisation will be. After her meeting with the client, Catrina updates both the stakeholder matrix and the roles and responsibilities matrix.

Activity 4

1. Review the previous example. What other actions could Catrina have taken to confirm her role and responsibilities?

2. If you are required to deliver a learning program, what documentation or other sources of information should you access to confirm your role and responsibilities?

Click to complete Activity 4

Summary

1. Learning program documentation should be accessed and reviewed carefully as it generally provides key information regarding the program's delivery requirements.
2. Wherever possible (within privacy and confidentiality constraints), access documents that will help you identify learner needs and characteristics that can be taken into consideration when establishing delivery requirements.
3. Identifying and assessing constraints and risks to delivery will help you minimise any difficulties or disruptions to training delivery.
4. You should review your personal role and responsibilities regularly as these may change with the various learning programs you are involved in.

Topic 2

In this topic you will learn how to:

2A **Refine existing learning objectives according to requirements and needs**

2B **Develop and document session plans**

2C **Use learning principles and theories**

Prepare session plans

After reviewing the learning program and relevant documentation to identify delivery requirements, the next step is to prepare session plans that provide the basis of the learning program delivery. An understanding of both the principles of learning (particularly for adults) and the broad theoretical frameworks of learning will help you prepare session plans appropriate to client needs.

Session planning will need to take learner profiles and group dynamics into consideration. As far as possible, the session plans should align the needs of learners and the learning program with the desired learning outcomes. Where relevant, sessions may need to be customised and contextualised to particular learners, the learning group needs or client requirements, while ensuring appropriate learning outcomes are achieved.

Effective facilitation of learning uses a range of learning/training methods and resources to provide an engaging and positive experience for learners. Prepare session plans that allow for contingencies and provide the opportunity to make adjustments to accommodate different learning needs and characteristics.

2A Refine existing learning objectives according to requirements and needs

A review of the learning program should have identified the desired learning outcomes and revealed information about the target audience. Learning outcomes may need to be refined so they are more in line with the program requirements and learner needs.

For example, many units of competency have a performance criterion that requires learners to 'work safely'. However, this will apply differently in different contexts; for example, working in an office as opposed to a warehouse. Likewise, learners may have specific needs that will determine how learning occurs; for example, the activities you might introduce in a 'work safely' session are likely to be different for learners who require intensive language support compared to other learners.

Recognised training delivered by an RTO is generally based on an accredited course, training package qualifications or units of competency that explain the performance outcomes, skills and knowledge required for a particular task. Units of competency will help you shape the learning program.

Learning outcomes/objectives

The terms 'learning outcomes' and 'learning objectives' are often used interchangeably; throughout this learner guide the term 'learning outcome' will be used. Learning outcomes 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.

Learning outcomes will be specified in the learning program documentation. However, they should be reviewed before preparing session plans to ensure they are relevant to the learner group and establish how they can be contextualised and/or adjusted to the needs of learners or organisation, if necessary.

If you are delivering training based on competency standards, a review of the unit/s of competency – particularly the performance evidence requirements – will help you understand what the learning outcomes are and how these can be contextualised to meet the specific needs of individual learners. The assessment requirements of a unit of competency are decided on after considering what competence in performing a job role entails. Aim to align specific performance criteria and delivery to the documents learners use in their workplaces.

Learner needs

Establishing the different needs and characteristics of learners or a client organisation allows you to tailor the design and delivery of training sessions to address those client group requirements.

Remember, learner needs may apply to:

- preferences relating to learning styles
- needs relating to physical or mental capacities
- language, literacy and numeracy issues
- cultural and religious needs
- requirements of a particular industry or organisation.
- life circumstances (sometimes crises occur; adults also need to be able to see that their training is relevant to their lives).

Responsive delivery strategy

The nature of learners' characteristics or needs will also determine the kind of delivery methods and strategies you may employ. The following table illustrates and explores some scenarios requiring a response to individual needs that you may encounter in a learning setting.

Group	Possible needs/ characteristics	Considerations for possible delivery strategy/method
Youth at risk/ early school leavers	Possible distrust of teachers/ adults due to past experiences.	Project work: learners choose a project to reflect personal interests and aspirations.
	Lack of motivation – perhaps due to perceived lack of course relevance.	Flexible delivery methodology; for example, learners can present their project via video, oral presentation or written report.
	Difficulty focusing on learning because they need to work to support themselves or their family.	Self-paced learning with support from trainer as required; this group may need planned, regular one-on-one progress meetings with their trainer to ensure that support needs are addressed and there is steady progress.
Process workers in a components assembly plant	Some may be shift workers, so they may not be able to attend a training session at certain times as this may clash with shifts or sleep periods.	On-the-job training with trainer availability to cater for different shift requirements.
	The assembly line cannot be stopped to enable training to occur.	Training could be conducted in small 'bites' during staff meetings, or at the start of shift meetings/briefings.

Group	Possible needs/ characteristics	Considerations for possible delivery strategy/method
Plumbing apprentices	Apprentices are likely to be working at different sites, so may not be able to attend formal training sessions.	Self-paced workbooks supported by workplace supervisor.
	Trainer may not be able to conduct on-the-job training due to worksite restrictions.	Phone/email support by trainer as required.
A group of recent migrants	May have difficulty focusing on learning if they have to balance work commitments with learning.	Flexible attendance at sessions; for example, open classroom where learners can attend at times (day and evening) when it suits them.
	Cultural differences; for example, some cultures do not have a 'wait' time in conversations, but talk at the same time.	Group work where learners at different levels work together and learn from each other.
	Learners may already have formal qualifications that are not recognised in this country.	Contextualise learning activities to learner backgrounds.
	Learners may not participate fully in activities due to language barriers or lack of confidence in speaking/writing English.	Ensure that language, literacy and numeracy (LLN) specialist support is available to assist learners.
Adult learners	May be unable to attend regular sessions due to family, work or community responsibilities.	Self-paced workbooks or e-learning options.
	May lack confidence if they have not undertaken formal training for some time.	Facilitate learners to form learning teams so they can support and learn from each other.

Work in accordance with standards, policies and procedures

Ensure that you always meet your obligations in relation to the standards you are required to comply with. For example, the Vet Quality Framework (VQF) monitors how the Standards for Registered Training Organisations (RTOs) 2015 are being met.

If you are working with training packages, these standards will be:

- The Standards for RTOs 2015 for National VET Regulator RTOs
- The AQTF
- The relevant training package
- Unit/s of competency

These documents provide broad direction about meeting learner needs, but it will be up to you as a trainer to ensure that training is customised and contextualised to meet client needs.

If you are not working in an RTO, refer to your organisation's policies and procedures for information on what is required to meet learner needs. If these do not provide sufficient assistance and direction, seek advice from the human resources (HR) department.

The VQF/AQTF and learner needs

If you are employed by an RTO, you should familiarise yourself with the VQF/AQTF and its components. Compliance is seen as critical to ensuring that all learners receive high-quality training, and for your organisation's continued RTO registration.

VQF/AQTF Standards require that an RTO adheres to the principles of access and equity, and maximises outcomes for its clients. According to Clause 1.7 of the Standards for RTOs 2015, the RTO must 'determine the support needs of individual learners and provide access to the educational and support services necessary for the individual learner to meet the requirements of the training product, as specified in training packages or VET accredited courses'. In addition, Clauses 1.1 and 1.2 discuss the amount of training required to enable learners to achieve outcomes.

Training packages/units of competency and learner needs

If you are planning to deliver a session based on one or more unit/s of competency, you should review the relevant training package and the unit/s of competency to ensure that you address all requirements in your delivery.

Think about your learners as you analyse each of the components; i.e. how might their particular characteristics affect training delivery and what strategies can you employ to support development of the required skills and knowledge?

'Unpacking' a unit of competency means reviewing all parts of the unit to understand the skills and knowledge required to be addressed. The following table lists the different components of units of competency, together with an explanation of what each component means.

Component of a unit of competency	Description/questions to aid unpacking
Unit title	▶ This is the work outcome or what the learner should be able to do once they have been deemed competent.
Application of the unit	▶ What is the scope, purpose and operation of the unit in different contexts; for example, in the workplace? ▶ What job roles does it apply to? ▶ Does it have licencing requirements?
Foundation skills	▶ Foundation skills are embedded in each unit of competency. They are listed separately in the unit of competency document of a streamlined training package. ▶ Locate the foundation skills so that activities and assessment tasks address them. ▶ Given learners' characteristics, what activities can you use to ensure that learners develop the foundation skills necessary for competent performance? ▶ What support might you need to seek; for example, LLN support?
Elements	▶ What are the broad tasks that need to be done? These are the major stepping stones or pathways that need to be completed to achieve the competence required.
Performance criteria	▶ What does the learner need to know/do? ▶ What is the required 'level' of performance? You should also check the AQF characteristics and distinguishing features to ensure that delivery and assessment is pitched at the right level. ▶ Where is LLN embedded? ▶ Where are the foundation skills embedded? ▶ Refer to knowledge evidence and performance evidence sections to make sure all of these are covered in your session plan/s.

Component of a unit of competency	Description/questions to aid unpacking
Assessment requirements	▶ These consist of knowledge evidence, assessment condition and performance evidence requirements. ▶ Refer to knowledge evidence and performance evidence sections to make sure these are all covered in your session plan/s. ▶ What learning activities can you use to support learners to achieve the required performance and knowledge evidence? What tools/resources do you need? ▶ Is there any overlap between the unit/s of competency? ▶ What learning and assessment activities can be used to ensure learners are able to provide the evidence required to demonstrate competency?

Cultural differences

Unpacking a unit of competency should also be considered in light of the learner's cultural background. Training packages provide some information regarding cultural appropriateness, which can be a good starting point.

Cultural differences may relate to:

- body language/gestures
- personal space
- religious/political beliefs
- communication styles
- learning styles.

Understanding your learners and any cultural differences they have will enable you to adjust your session. Aim to accommodate and utilise any cultural differences to support learners, both individually and as a group. For example, learners from an Indigenous background may prefer to learn in groups through stories, maps and pictures. They may learn better in community surroundings rather than at an RTO. For more information about learning strategies that can cater for the needs of an Indigenous learner group, visit:

- www.qcaa.qld.edu.au

Language, literacy and numeracy needs

Language, literacy and numeracy (LLN) components are embedded in every unit of competency. When determining what learning activities to include in your session plan, be mindful of the learners' current LLN level and the standard expected in the unit of competency. Incorporate activities that deliberately support LLN development. This could include group work where learners can learn from each other and providing model texts of writing that learners are required to understand to perform a particular job; for example, reporting hazards using an organisation's incident report form.

If your RTO employs an LLN specialist, they can provide advice to address the LLN needs of a learner group. Industry and professional organisations have produced materials to support LLN needs for people who are undertaking training in particular industries. You can find links to the Australian WELL Practitioners' Network resources at:

- http://awpn.com.au/resources

Contextualise the training

Contextualising training takes generic training/learning objectives and tailors them to meet the needs of a learner or a workplace. 'Customising', on the other hand, refers to the process of selecting, adding or subtracting those particular units that match the learner or workplace needs. Customising a course is the responsibility of a program manager rather than a trainer. However, as a trainer, you can have input into contextualising a unit of competency. Contextualising a unit of competency involves making it relevant to the learner while maintaining the unit's integrity.

Implementation guides to streamlined training packages include advice about contextualisation. For example, the BSB Business Services Implementation Guide explains that contextualisation could involve additions or amendments to the unit of competency to suit particular delivery methods, learner profiles, enterprise equipment requirements or to otherwise meet local needs. However, the integrity of the unit of competency's overall intended outcome must be maintained.

For example, an RTO is delivering training in BSBADM405 Organise meetings decides that assessment candidates must use specific organisation guidelines for administering board meetings in order to meet the performance criteria 2.1: 'Prepare notice of meeting, agenda and meeting papers in accordance with meeting requirements'.

Contextualising units of competency respects the integrity of the overall intended outcome of the unit of competency by keeping within the bounds of the following advice.

Elements and performance criteria

- Contextualisation must not remove or add to the number and content of elements and performance criteria.

Terminology

- Contextualisation may add specific industry terminology to performance criteria where this does not distort or narrow competency outcomes.

Breadth

- Changes must not diminish the breadth of application of the competency or reduce its portability.

Foundation skills

Your session plan should identify the activities that learners will complete to develop the foundation skills required to perform competently in the workplace. These are listed in unit of competency documents.

Foundation skills may be particular or general, and are usually embedded in performance criteria.

BSBADM405 Organise meetings includes a foundation skill of writing: 'Edits and corrects own work to ensure accuracy'. This skill is embedded in the performance criteria 2.2: 'Check documentation for accuracy and correct any errors'. Where performance criteria 2.2 is addressed in session plans, it can be assumed that the need for learners to develop the foundation skill will be addressed.

Here are examples of activities that can be used to ensure learners develop typical foundation skills, which are also developed in conjunction with the skills and knowledge required by the unit of competency.

Oral communication

- Preparing and presenting written and verbal reports
- Role-plays
- Simulations
- Demonstrations
- Working in groups
- Communicating with and responding to internal/external clients and customers

Interact with others

- Team/group projects
- Group discussion
- Workplace teams
- Committees
- Syndicates
- Communities of practice

Get the work done

- Research and data collection
- Developing action plans
- Planning and organising events
- Time-management activities
- Goal-setting activities and scheduling tasks
- Using information and communications technology skills to complete activities
- Industry-relevant software, technology and equipment

Example

Refine existing learning objectives according to requirements and needs

Vincent is asked to deliver a learning program to help unemployed people find work in call centres.

He is advised that all the learners selected for the training have indicated that they want to work in a call centre and that upon successful completion of the training, these learners will be offered employment in a large call centre.

The learning program is based on the qualification BSB30215 Certificate III in Customer Engagement. Vincent reads the training and assessment strategy document. He then reviews the units of competency used to form the learning program and the completed learner enrolment forms. He notes that some of the participants are likely to need time away from the course due to cultural activities, and makes a note to take these dates into consideration when preparing his session plans. Vincent also looks at what adjustments he will need to make to align the program and learner needs to the units of competency. He notes that one of the core units is *BSBWHS302 Apply knowledge of WHS legislation in the workplace*, a generic unit that does not apply directly to customer call centres. He will need to discuss this with his manager.

The following table shows how Vincent has contextualised a performance criterion from this unit while remaining compliant with the training package rules.

Unit of competency	Element	Performance criteria	Contextualisation
BSBWHS302 - Apply knowledge of WHS legislation in the workplace	1. Determine the legal framework for WHS in the workplace	1.1 Identify and access current WHS legislation and related documentation relevant to the workplace, occupation and industry	Identify and access current WHS legislation, codes, standards, policies and procedures affecting XYZ Contact Centre, and how they apply to you in your role as a customer service representative.

Activity 5

1. Access http://training.gov.au and download a unit of competency that is relevant to your current role or a past role. For example, if you work (or worked) in childcare, download a relevant unit of competency from CHC30113 Certificate III in Early Childhood Education and Care. Explain why the unit you have chosen is relevant to your industry or role.

2. Access and the read advice included in the training package implementation guide relating to contextualisation. Explain in your own words what contextualisation is.

3. Give two examples of how you could contextualise the unit you have selected. Use the following table to provide your response.

Unit of competency	Element	Performance criteria	Contextualisation

4. Explain how your answer to question 3 adheres to training package rules for contextualisation.

Click to complete Activity 5

2B Develop and document session plans

Session plans show how delivery is aligned to the learning program. In a multi-session training program, the plan for each session describes how one part of the learning journey will be completed. In effect, a good session plan provides detail and clarity of the what, when, where and how of learning content, activities and assessments. It will also detail timings and resources, and will have been developed after considering individual learners' specific needs.

A well-developed session plan provides the trainer with a sequence for delivering each session.

Session plan content

All session plans must be documented. Some organisations provide a session plan template; however, if one does not exist, you should develop one in a suitable format. Training organisations often provide a template so that session plans conform to the same standard across the organisation. Ask your trainer for a sample 'Session plan' template. Aspire has included relevant templates in the *Trainer's and assessor's guide* for this unit.

Session plans should identify:

- The name of the program/session
- The goal or aim of the session
- The learning outcomes of the session
- The length of the session
- How each learning outcome is going to be achieved (topics, activities)
- How long each topic/activity will take
- What resources you need for each topic/activity
- Formative assessment points
- Summative assessment information

Planning process tasks

General considerations apply to all session planning and tasks. These are specific to the unit of competency and can be challenging to determine. A trainer who has worked in a particular field for some time may be able to use their experience to deal with the general considerations quite quickly.

While some parts of the planning process will be quite clear, such as the aims and outcomes of the program or sessions, other planning tasks may require careful thought. Although there is no one correct of way of doing this, you may find it useful to use a structured approach, like developing a matrix listing the learning outcomes and how you will address each one.

General considerations

- Organisational/industry requirements, if relevant
- Any learner needs and characteristics you have identified
- Adult learning principles
- Cost of resources
- Access to resources

Unit-specific challenges

- How each learning outcome is going to be achieved (topics, activities)
- How long each topic/activity will take
- What resources you need for each topic/activity

Session duration

It is likely you will be advised of the overall time lines for the learning program, or the unit/s of competency or stand-alone sessions you are preparing to deliver. Within these constraints, you should allocate time to session delivery. The duration of each session will generally be determined by the complexity of the learning to take place. Bear in mind that in the VET system, competence is not time-based; program and session timing is an administrative necessity.

If you are employed by an RTO to deliver an accredited course, qualification/part-qualification or a fee-for-service program, the overall program duration will be established based on nominal hours, cost or available funding. You will need to allocate time to conduct sessions within time and cost parameters.

The overall session duration is likely to have been predetermined by timetabling or some other form of organisational constraint. Make sure you adhere to the amount of training outlined by ASQA.

You can access the Fact sheet: Determining the amount of training at:

- www.asqa.gov.au/media-and-publications/amount-of-training1.html

Learning topics/activities

You will have identified the learning topics or content from your review of the learning program documentation and unpacking of the unit/s of competency. The next step is to determine how the topics will be sequenced, the content to be covered in each topic and the activities that learners will complete to develop the required skills and knowledge.

Units of competency have already been developed so that the broad topics and sequence have been identified. For example, in the unit of competency BSBADM101 Use business equipment and resources, there are three elements, sequenced as follows:

1. Select equipment or resources
2. Operate equipment
3. Maintain equipment or resources

Similarly, within an element, the component parts of the element (the performance criteria) have also been logically sequenced. For example, the performance criteria of Element 1, Select equipment or resources, are broken up into smaller sections that identify the knowledge and skills to be addressed. These are derived from performance evidence and knowledge evidence, contextualised to the learner's environment. Assessment conditions should be checked as they indicate what resources a learner and assessment candidate requires access to.

1.1 Identify and access business equipment or resources to complete the task under direct instructions

Knowledge and skills to be addressed:

- types of business equipment and resources
- functions of the different types of business equipment/resources; i.e. what the equipment can do.

1.2 Estimate quantities and resources correctly to complete the task

Knowledge and skills to be addressed:

- which equipment/resource is best suited to each task?

1.3 Check equipment for serviceability in accordance with equipment instructions

Knowledge and skills to be addressed:

- types of equipment instructions
- where they can be located – records relating to resources
- how to maintain equipment/resources.

Attend to foundation skills

How you deliver the knowledge/skills component of a unit of competency depends on the learners' characteristics. You should also take into consideration:

- the foundation skills embedded in the unit of competency
- any foundation skill level gaps between the requirements of the unit of competency and learners' skill levels (for example, oral communication skills).

For example, if the learning outcome relates to using particular software, you could use slightly different approaches to the learning depending on the group of learners. In the following approaches, option 1 may be suitable for learners who have difficulties reading or working on their own, while option may be suitable for learners who prefer to work at their own pace.

Option 1
1. Explain the concept. 2. Demonstrate the end-to-end process. 3. Demonstrate the first step. 4. Ask learners to practise the first step. 5. Demonstrate the first step again (this will confirm to learners they are doing it correctly). 6. Demonstrate the next step. 7. Continue the process of demonstrating, practise, review, next step. 8. At the end, demonstrate the entire process. 9. Have learners complete an activity that encompasses the entire process.

Option 2
1. Explain the concept. 2. Demonstrate the end-to-end process. 3. Ask learners to complete the self-paced learner guide activity. 4. Encourage learners to ask each other if they have difficulties. 5. Move around the room, supporting learners who need assistance.

Timing

If you are presenting information and skills in using software or another learning outcome, each of the options would require different amounts of time depending on:

- the number of learners
- the complexity of the software
- learner characteristics (for example, their language/reading skills and familiarity with computers).

Any strategy you decide on requires time. You should step through your delivery strategy and plan how much time is needed; if necessary, choose a more time-friendly strategy.

When planning learning activities, ensure that learners have sufficient time and opportunity for practice to develop their competence.

This table describes some examples of different methods, with suggestions for timing.

Strategy	Strategy considerations	Timing considerations
Small group work	▶ Learners can learn from each other. ▶ Opportunity to work as a team. ▶ Some members of the group may not contribute. ▶ Some learners may take over the discussion.	Allow time for: ▶ giving clear instructions about the purpose and outcome expected ▶ questions ▶ recapping the purpose of the group work and its relationship with the session/ topic.
Projects	▶ Can be done individually or in a group. ▶ Provides flexibility in presentation as responses can be presented orally, in a report or in a PowerPoint presentation.	Allow time for: ▶ giving clear instructions about the purpose and outcome expected ▶ questions ▶ presentation of projects ▶ recapping content and its relationship with the session/ topic.
Lectures	▶ Learners with a short attention span may not be able to focus for the required amount of time, and may disrupt the session and/or not understand the content. ▶ Learners with language barriers may not understand the content.	Allow time for: ▶ giving clear information about the content of the lecture and its purpose ▶ questions ▶ recapping content and its relationship with the session/ topic.
Self-paced/ self-directed learning	▶ Learners can complete activities at their own pace. ▶ Without supervision, learners who are hesitant to ask for assistance may not complete activities.	Allow time for: ▶ giving clear instructions about the purpose and outcome expected ▶ questions ▶ recapping content and its relationship with the session/ topic.

Strategy	Strategy considerations	Timing considerations
Case studies	▶ Allows learners to draw on their experience and use this as a basis for applying new learning to a given scenario. ▶ Might be difficult for learners who have a reading or language barrier.	Allow time for: ▶ giving clear instructions about the purpose and outcome expected ▶ reading case study material ▶ ensuring all learners understand the case study ▶ presenting responses to the case study ▶ recapping content and its relationship with the session/ topic.
Discussions	▶ Allows for interactive, participatory learning where learners can share experiences and reflect on their own and others' experiences.	Allow time for: ▶ giving clear instructions about the purpose and outcome expected ▶ questions ▶ recapping the purpose of the discussion and its relationship with the session/ topic.
Role-plays	▶ Some learners may be too self-conscious to participate. ▶ Learners who have language barriers, or are not motivated may not participate.	Allow time for: ▶ explaining the purpose of the role-play ▶ clarifying expectations ▶ practise ▶ role-play presentations ▶ questions after each role-play.
Guest speaker	▶ May provide current industry information.	Allow time for: ▶ introducing the guest speaker ▶ presentation (be clear to the guest speaker how much time they have) ▶ questions ▶ recapping what the guest speaker spoke about and how this relates to the session/ topic.

Dimensions of competency

For learners to be assessed as competent, they need to be able to do what a unit of competency requires them to do in a range of situations and environments, and according to workplace expectations. Your session plan will need to provide for a variety of activities and opportunities for learners to practise applying their skills and knowledge so they can develop their competence. This may involve asking additional 'what if' questions to provide more depth to their evidence and understanding.

The dimensions of competency (aspects of work performance) are described here.

Task skills

- The ability to complete a task at the required skill level.

Task management skills

- The ability to manage more than one task at a time. This involves planning, organising and communication skills.

Contingency management skills

- The ability to respond when something goes wrong or not as planned.

Job/role environment skills

- The ability to perform to the level expected in the workplace and fulfil work-related responsibilities.

Learning resources and materials

Your session plan should also include a list of resources and learning materials that will be used by either the trainer or the learners.

Learning materials:

Learning materials could include:

- activity/work sheets and case studies
- DVDs or other electronic learning materials
- learner guides and trainer guides
- tools and equipment for practical sessions
- assessment handouts
- evaluation forms.

Resources

Resources include all materials needed by a trainer to deliver training, as well as materials needed by learners to complete the learning activities. These may include:

- computers and printers
- data projectors
- DVD players
- flip charts
- whiteboard markers/erasers
- general stationery.

Considerations for using learning materials

When selecting your resources and materials, consider the following.

Availability

Ensure resources will be available as well as spare parts, if necessary; for example, a spare globe for a data projector or spare batteries.

Cost

Ensure the resources and/or materials are within budget.

Cultural appropriateness

Consider whether learners may find material hard to use because of assumed cultural knowledge.

Time requirements

The learning resources and materials you elect to use will also have a time impact, so as you consider each one, think about time required to:

- explain to learners how to use the resource/material
- revert to another strategy if the resource is not working as expected.

Types of assessment

Your session plan will need to identify when assessment activities will take place. Assessments can take place throughout the session and/or at the end of the session. You will need to allow time for conducting assessments, if relevant.

Formative assessment

Formative assessment is the term used to describe assessment conducted throughout the learning process, including practice activities that you provide learners with each session. They may also be discrete tasks that learners need to successfully complete before they can move onto the next stage of learning.

Formative assessment is useful for:

- you and the learner to understand what the learner's progress is and negotiate additional support, if necessary
- identifying a learner's current skills and knowledge so you can adjust your session plan to meet their needs
- determining whether the learner is ready for final assessment
- capturing evidence of a learner's competence in a progressive manner.

Summative assessment

Summative assessment is used to determine the learner's skills and knowledge in a comprehensive manner; i.e. by taking the entire learning program into consideration, rather than just a single part of it. Summative assessment is the final assessment an assessor will use to determine the learner's competence or successful completion of the learning. Normally, this kind of assessment occurs at the very end of a learning program.

Contingency planning

Session plans will provide you with a structure to follow in your training session; however, training sessions do not always progress exactly as intended. Predicting these and other contingencies is difficult. You should ask experienced trainers about their experiences and how they managed any issues.

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

Examples of things that could go wrong include:

- One or more of the computers malfunctions.
- A fire drill occurs, taking up valuable learning time. How will you ensure that learners still achieve their learning outcomes?
- The data projector you planned to use fails.
- Some learners arrive midway through the training and have missed one or more sessions.
- Formative assessments indicate that some learners are struggling.

Contingency management plan

As well as discussing contingency management with other trainers, you should also develop a session contingency plan, such as the following.

Issue	Contingency management plan
Insufficient operational computers	▶ Pair learners and ensure that each learner has the opportunity for hands-on practice. ▶ Contact the IT department during a break.
One or more learners arrives late	▶ Use the opportunity to review what has been covered so far. ▶ Together with learners, agree on how they can catch up if required; for example, reading the relevant learner guide chapter at home or completing practical work in a computer lab.

Adhere to organisational standards

Your session plan must adhere to the standards required by your own organisation. Different organisations require different levels of detail. Some organisations prefer to include a degree of flexibility to allow for contingencies. Alternatively, some organisations require timing to be very detailed, as the following table shows.

Introductions		
Time	**Content**	**Resources required/notes**
2 mins	Why we are here	
2 mins	Overview of learning program and how this session fits in	
2 mins	Learning outcomes	
5 mins	Assessment	
10 mins	Housekeeping (WHS, breaks, how to contact facilitator, getting help, etc.)	
10 mins	Getting to know each other	Icebreaker activity to support 'getting to know each other' activities

Example

Develop and document session plans

The following example shows how a trainer has successfully drafted a session plan that takes into consideration the key requirements for developing and documenting the plan. This example includes an outline of all sessions, but the details of session 1 only.

Session plan	
Learning program	This program consists of one unit of competency from ICT10115 Certificate I in Information, Digital Media and Technology: *ICTICT101 Operate a personal computer* (Core) Learners who complete this unit of competency will be awarded a statement of attainment.
Session name	ICTICT101 Operate a personal computer
Aim of learning program:	To enable learners to: ▶ operate a personal computer, including starting the PC, logging in, using and understanding desktop icons and their links to underlying programs ▶ manage computer configurations ▶ access the internet and conduct a basic search ▶ use computers safely by: – attending to WHS considerations – using firewall and antivirus to reduce security threats – backing up important documents to minimise risk of data loss.
Learning outcomes (objectives)	Session 1: ▶ Start the computer ▶ Log in ▶ Attend to WHS considerations ▶ Access basic system information ▶ Configure power management settings ▶ Navigate and manipulate desktop environment ▶ Formative assessment ▶ Review activity
	Session 2: ▶ Organise basic directory/folder structure and files ▶ Organise files for user and/or organisation requirements ▶ Access external storage devices to retrieve, copy, move and save information ▶ Shut down computer ▶ Review activity ▶ Formative assessment

<table>
<tr><th colspan="2">Session plan</th></tr>
<tr><td rowspan="2"></td><td>Session 3:
Use firewall and antivirus to reduce security threats
Access the internet and conduct a basic search
Access and play multimedia files
Install and remove free antivirus software
Review activity
Formative assessment</td></tr>
<tr><td>Session 4:
Send and receive a simple email message
Print information
Summative assessment</td></tr>
<tr><td>Assessment criteria
Session 1</td><td>Check peripheral device connections to ensure correct position and re-connect if necessary.
Switch on power at both the power point and computer.
Insert username and password as prompted and note access, privacy, security and related conditions of use displayed on introductory screens.
Navigate through the operating system to access system information, and identify system configuration and application versions in operation.
Configure the operating system to save power.
Use online help functions as required.
Navigate around desktop; create and customise desktop icons.
Select, open and close desktop icons to access applications.
Manipulate application windows and return desktop to original condition.</td></tr>
<tr><td>Name of facilitator</td><td>Lin Tran</td></tr>
<tr><td>Duration of sessions</td><td>9am–1pm (4 x 4 hours face-to-face delivery)
15-min break each session</td></tr>
</table>

Session plan		
Resources required	Computer with Windows and Microsoft Office installed per learner Data projector (for trainer demonstrations) Institute-generated login details for each learner Learner guide for ICTICT101 Operate a personal computer Whiteboard, whiteboard markers and eraser Ice-breaker activity	
Session 1		
Time	**Content**	**Resources required/notes**
9.00 am – 9.30 am	▶ Why we are here ▶ Overview of learning program and how this session fits into the picture ▶ Learning outcomes ▶ Assessment ▶ Housekeeping (WHS, breaks, how to contact facilitator, getting help, etc.)	Learner guide for ICTICT101 Operate a personal computer
9.30 am – 10.00 am	▶ Getting to know each other activity	Ice-breaker activity to support 'getting to know each other' activities
10.00 am – 10.30 am	▶ Learners to complete a self-assessment checklist to determine prior knowledge ▶ Explain and demonstrate: – parts of a computer system (for example, mouse, keyboard, visual display unit, monitor, printer) – how to check all peripheral devices are connected correctly – how to switch on power at power point and computer – WHS considerations	Quiz to determine existing knowledge
10.30 am – 10.45 am	Break	

Session plan		
10.45 am – 11.00 am	Activity 1: ▶ Learners to ensure that peripheral devices are connected correctly and then to start up the computer. ▶ Adjust equipment. ▶ Explain terminology: – Hardware (monitor, desktop, printer, mouse, etc.) – Laptop – Server – Workstation	
11.00 am – 12.00 pm	Activity 2: ▶ Logging in ▶ Select Start button→Control panel→System and security ▶ Explain where to find Windows edition, RAM information and processor. Provide simple explanation where necessary. ▶ Select Control panel→ System and security→Power options and select 'Power saver' energy option. Trainer explains advantages and disadvantages of this setting. ▶ Access internet via Chrome icon on desktop ▶ Perform search, as per instructions, to access 'Practice using a mouse' activity (click, double click, drag and drop) at seniornet.org	Google search 'using a mouse exercise' brings SeniorNet exercise up first
12.00 pm – 12.15 pm	Activity 3: ▶ Demonstrate: – moving desktop icons – right-click options – creating desktop folders – recycle bin – putting new desktop folder in recycle bin ▶ Learner practice: create and move desktop icons	
12.15 pm – 12.45 pm	Activity 4: ▶ Learners to complete Chapter 1 quiz in learner guide ▶ Review learner responses	Chapter 1 quiz in learner guide

Session plan		
12.45 pm – 1.00 pm	▶ Provide overview of session ▶ Address any concerns by asking learners to write a question/concern on a piece of paper – these should be placed in a container and drawn out by the facilitator to ensure anonymity. Address the question/concern ▶ Discuss what a person should do if they are unable to log in on a workplace computer (ask their supervisor) ▶ Provide an overview of the next session ▶ Suggest learners review Unit 1 in their learner guide prior to next session ▶ Remind learners of your contact details	
Assessment	Formative: ▶ self-assessment ▶ complete Chapter 1 quiz ▶ trainer observation and feedback.	

Activity 6

1. Review the session plan in the previous example. Document any evidence you find that confirms the following have been taken into consideration:
   - Formative assessment points
   - Dimensions of competency
   - Acknowledgment of existing skills and knowledge
   - Foundation skills (look up this unit up on http://training.gov.au)
   - Contextualisation

2. Explain how you could improve the session plan to more proactively include these requirements.

3. Select a unit of competency from a training package that is relevant to your work experience. Develop a session plan that could be used to deliver this unit of competency with an LLN focus. Ask your trainer to provide feedback. Ask your trainer for a sample 'Assessment plan' template.

Click to complete Activity 6

2C Use learning principles and theories

A session plan helps you to plan and structure the training session. Ultimately, the purpose of the session is to support the learner to gain the skills and knowledge they require. Identifying and understanding any special needs will allow you to contextualise training and/or make required reasonable adjustments to delivery structure and formative assessments.

You also need to be able to understand and apply general principles of learning, learning theories and principles of adult learning to ensure that the training supports a wide range of learning styles and learner preferences.

To do this effectively, you should:

- be mindful of the target group you are dealing with
- align your delivery to learning program outcomes
- be aware that you will need to cater for individual differences.

Learning principles

Knowing about basic learning principles helps you to understand how learners learn and how to use this knowledge when preparing to deliver training. These fundamental principles are likely to apply to most learners and are useful when developing your session plan and learning activities. Here are 10 key learning principles and explanations of each.

Learners need to be ready to learn

- All basic needs must be addressed before learners can learn; for example, someone who is ill or has personal problems may not be able to participate effectively in the learning program.
- This also applies to learners who do not attend the session willingly; for example, if their employer tells them they must attend the session, but the learner does not see the session as having any relevance to their current role.

Content should be meaningful to the learner

- Learners should have the required prerequisite skills and knowledge. Generally your training should take the learner on a path from what they already know to where the competency requires them to be at the end of the session.

Sufficient practice improves understanding

- New skills and knowledge are more readily retained when they have been practised sufficiently.

Feedback/reinforcement encourages learners

- Providing learners with feedback (for example, encouraging them to ask questions or to respond to questions) will ensure that both the trainer and the learner know what progress is being made, or if additional training or support is required.
- Learners learn best when they are able to achieve. Seeking and providing feedback is integral to fostering success.
- Learners should be recognised for their achievements. For example, acknowledge successful completion of an activity.
- Remember that feedback can be verbal or nonverbal. If you see a learner's attention is lapsing, this could mean they haven't understood what you are explaining.

Get it right the first time

- The principle of primacy refers to learners needing to learn correctly the first time as it can be difficult to 'unlearn' something once it is learnt.
- Your session plan, therefore, needs to be structured and delivered in a logical and sequential manner.
- Constantly reinforcing knowledge/skills being developed and ensuring that learners learn each task before progressing to the next task supports this principle of learning.

Opportunities for practice should be provided soon after learning

- The application of new knowledge/skills should be done as soon as possible after the training so that it is practised and remembered. This could be done by end-of-session activities to help reinforce learning as well as at the beginning of the next session. This kind of revision can assist learners to recall knowledge/skills developed during the previous session and leading in to the next session to show how the two sessions link in with each other.
- Experienced trainers often explain the principles of primacy and recency as:
  - tell learners what you are going to tell them
  - tell them
  - tell them what you have told them.
- If you chunk or break down your session into topics and sub-topics, you will be able to utilise the theory of primacy and recency many more times in the one session. This approach will also give you more control over session timing.

Learning by doing

- The learner is more likely to retain new knowledge/skills if they learn by doing. Practical learning is often far more effective than theoretical instruction.

Multiple sense learning/intensity

- The learner is more likely to learn when more than one sense is engaged. For example, when teaching learners how to bake a cake, the trainer can:
  1. Give the learners the recipe and read through it with them.
  2. Show them the ingredients as the recipe is read.
  3. Mix the ingredients together as the recipe is read.
  4. Mix the ingredients together as the recipe is read, bake the cake and let learners taste it.
  5. Let everyone do these steps together.
- Option 5 engages all five main senses (i.e. sight, sound, touch, smell and taste), thus making it more likely that the learner will be able to bake the cake next time on their own.

Over-learning

- Over-learning means practising until the knowledge/skill is embedded and recall is automatic.
- Over-learning can also be done by setting a slightly higher target than required; for example, if a learner is required to pass a typing speed of 30 words per minute (WPM), you might want to encourage them to achieve 35 WPM. This becomes a stretch target and provides a challenge to the more advanced learners. It also increases the likelihood of the achievement of 30 WPM.

General learning theory

There are many variables that can affect learning and hence achievement of learning outcomes. In addition to applying some general learning principles when developing your session plan and learning activities, you should also take into consideration some of the learning theories and models that are used to describe how people learn.

For many older adults, ‘learning’ is associated with what they experienced at school; i.e. learning was directed by a teacher who held all the ‘important’ knowledge. In this kind of learning situation:

- the teacher is the expert and responsible for the learning process
- the learner’s role is passive
- learners are only motivated to learn because they ‘have to’
- learning is ‘information-centred’.

Adult learning principles

In contrast to this teacher-centred model are 'adult learning principles', a theoretical model of adult learning articulated by theorist Malcolm Knowles from the late 1970s onwards. Knowles's thinking, sometimes referred to as 'andragogical theory' (the method and practice of teaching adults as opposed to pedagogical theory, the method and practice of teaching children) is based on five key assumptions about what drives adult learning. While the Knowles theory has been challenged by other theorists, it remains a useful way of viewing and facilitating adult learning.

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

Relevancy-oriented
The need to know: adults are relevancy-oriented ▶ Adults need to see the reason for learning something; i.e. how they will be able to use the new skills/knowledge. For example, a childcare worker is unlikely to see the relevance of learning how adults learn; however, they are likely to be very interested in understanding how preschool children learn.
Autonomy
The learner self-concept: adults are autonomous and self-directed ▶ Adults need to be responsible for making their own decisions; they want to be treated as capable of self-direction. The 'teacher' is really a facilitator supporting the adults to learn. ▶ Forcing adults to participate in activities is unlikely to contribute to a successful learning outcome, so be prepared to offer a variety of activities and to ask the learners for their opinions and suggestions.
Life-experienced
The role of the learner's experience: adults bring life experiences and existing knowledge with them ▶ Adult learners already have a range of life experiences that are a resource for learning. These experiences are, however, filled with bias and assumption. Nevertheless, adults should be treated as equals and their existing experience/knowledge/skills respected. ▶ Learner life experience should be used to provide a connection to the new knowledge/skills being learnt. At the beginning of the session find out about their existing knowledge, skills and experience and why they are participating in the training. Link the content to the learner, making it more real for them and also satisfying the adult's need for recognition.
Practical
The readiness to learn: adults are practical ▶ Adults must see a relationship between the new knowledge/skills and how it will help them. They are ready to learn the things they need to know to cope effectively with work and life situations. ▶ Ensure that learning activities are relevant, meaningful and allow learning to be applied to the learner's work or life in general.

Goal-oriented
The reason for learning: adults are goal-oriented ▸ 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/life. Trainers can facilitate this by reinforcing the relationship between the session and learner goals. ▸ There may be times when the learner has been directed to attend the session by their employer and is therefore an unwilling participant. Establish the reason/s why the employer is requiring the learner to attend, and stress the benefits for the learner from the learner's perspective.

Specific learning theories

There are many more theories and models you can refer to in order to further your own knowledge and understanding of how to support particular individuals or learners in a group. The following table offers possible starting points with the names of the theories and theorists provided for you. Knowledge of all these theories is not essential for a trainer.

Type of theory	Theory	Theorist
Behaviourist theory	Classical conditioning theory	Ivan Pavlov (1849–1936)
	Behaviourism	John B Watson (1878–1958)
	Operant conditioning	B F Skinner (1904–1990)
Gestalt learning theory (relating to perception, decision-making, attention, memory and problem-solving)	Gestalt learning theory	Max Wertheimer (1880–1943)
	Cognitive dissonance	Leon Festinger (1919–1989)
Constructivism theory (knowledge is constructed; the learner is an active creator)	Constructivism	Jerome Bruner (1915–2016)
	Cognitive development	Jean Piaget (1896–1990)
	Learning styles	David Kolb (1939–)
Psychoanalytic theory (the role of the unconscious mind in learning)	Psychoanalytic theory of learning	Sigmund Freud (1856–1939)
Humanistic perspective (emotions and affect play a role in learning)	Humanistic theory of learning	Abraham Maslow (1908–1970)
	Experiential learning	Carl Rogers (1902–1987)
	Transformational learning	Jack Mezirow (1923–2014)

Type of theory	Theory	Theorist
Social learning perspective (learning as a group process)	Social constructivism	Lev Vygotsky (1896–1935)
	Observational learning	Albert Bandura (1925–)
Instructional theories	Characteristics of adult learners	K P Cross (1926–)
	Conditions of learning	Robert Gagne (1916–2002)
	Andragogy	Malcolm Knowles (1913–1997)

Adapted from table at www.lifecircles-inc.com/Learningtheories/learningmap.html

Scaffolding

Scaffolding represents the helpful interactions between the trainer and the learner that enable the learner to do something beyond their immediate skill or knowledge. The basic premise of scaffolding is that the trainer or experienced peer provides the support and scaffolding for the learner until the new knowledge or skill is assimilated or developed. The scaffolding support system can be gradually withdrawn as the learner begins to take over and apply their knowledge or skills. For example, providing LLN learners with progressive fill-in-the-gap exercises that ask them to supply more and more chunks of a model text until they can reproduce all or most of it independently.

Being able to apply learning theory will help you structure sessions and accommodate different learning styles.

Learning styles and preferences

While principles and theories of learning apply to how people learn, individual learners will have a particular preference for how they learn best; i.e. their preferred learning style. For example, they may prefer learning independently online or through group discussion. You may also have heard of visual, auditory and kinaesthetic (VAK) learning styles. In recent years this theory has been criticised for pigeonholing learners too narrowly. People may benefit from learning in all of the following ways. The terms 'visual', 'auditory' and 'kinaesthetic' are explained below, along with descriptions of learning styles that come from other theorists. It is good teaching practice to provide learners with a variety of ways of learning.

Knowing how to apply learning principles, theories and styles will help you deliver learning sessions in a way that will engage all learners. You can also identify possible reasons for why something isn't quite going to plan during your delivery.

Visual

- Many learners readily take in visual information, such as demonstrations, posters and movies. For example, showing learners a PowerPoint presentation is more effective if images and graphs are included as well as text.

Auditory

- Auditory information is well received by some learners; for example, through lectures or audio. These learners prefer to hear verbal explanations rather than read learner notes.

Kinaesthetic

- Kinaesthetic learning is learning by doing, also known as 'hands-on learning', i.e. learners trying things for themselves.

Global

- This style is aligned to the way a learner's brain functions. The global/right brain learner has a visual learning style; they look at the big picture first before attempting to understand the detail.

Analytical

- This style is aligned to the way a learner's brain functions. The analytical/left brain learner has an auditory learning style; they need to understand the details before they can see the big picture.

Theoretical

- A preference for understanding the theory relating to the learning content.

Pragmatist

- Less concerned with theory, a pragmatist learner prefers to learn by doing – they prefer to just jump in and have a go.

Reflective

- The reflective learner prefers to learn by watching and thinking about what they have heard or observed.

Example

Use learning principles and theories to generate ideas to manage training session delivery

Roland is a relatively inexperienced trainer, but he has prepared well for the session he is about to deliver. The session title is 'Impact of poor customer service on internal customers'. In addition to Knowles's principles of adult learning, Roland decides to structure the session plan utilising Gagne's nine-step instructional model:

1. Gain attention
2. Inform learners of objectives
3. Stimulate recall of prior learning
4. Present the content
5. Provide learning guidance
6. Elicit performance (practice)
7. Provide feedback
8. Assess performance
9. Enhance retention and transfer to the job

The session starts off well, particularly because Roland gains the group's attention by drawing on his knowledge of the organisation and articulating the relevance of the learning objectives language and examples that learners can relate to.

Roland has planned his session around role-plays as he feels that active learning is the best way to ensure the group shares their knowledge and experiences learning in a way that will prepare them for workplace application. His methodology is to nominate two learners to role-play a given scenario – each learner is a representative from a different business unit. The rest of the group is required to observe the role-play and make notes on 'what goes wrong' and how this impacts on the two business units. At the end of the activity, Roland leads a general discussion based on the observers' notes.

Roland is disappointed that very few learners are actively participating in the discussion. He realises he is losing the group's interest and decides he needs to change direction.

During the morning tea break, Roland reflects on what has gone wrong. He decides he's not adequately addressing individual learning styles.

1. After the break, Roland presents the second activity slightly differently:
2. He asks learners to break into groups of three and has each group brainstorm five examples of events they have experienced that have led to service issues. One person from each group is to document the events.
3. Each group is then asked to nominate a person to report the events that they have identified to the wider group.

The wider group then votes on the top three events that affect the service levels between the two business units.

The groups are asked to select one of the top three events that have the greatest impact on them and develop a recommended solution or procedure to stop the event occurring, or at least minimise the damage. The recommended solution can be presented in a format of their choice; for example, a PowerPoint presentation, flip chart or poster.

Roland notices there is a buzz developing in the group, with a lot more involvement from all participants.

Activity 7

1. Assess your own learning style or preferences at one of the following sites:
   - www.clinteach.com.au/assets/LEARNING-STYLES-Kolb-QUESTIONNAIRE.pdf
   - https://ed4online.com/blog/what-your-learning-style
   - http://marciaconner.com/assess/learningstyle
   - www.edutopia.org/multiple-intelligences-assessment

   You may notice that you have more than one preference and you may like to progress through different ways of learning at different times.

2. Develop a toolkit for your own use that gives examples of two activities that could be used for each of the following learning styles. You may wish to use the following table.

Learning style	Activities that would support this learning style
Global/right brain	
Analytical/left brain	
Theoretical	
Pragmatist	
Reflective	
Visual	
Auditory	
Kinaesthetic	

Click to complete Activity 7

Summary

1. By establishing the different needs and characteristics of learners and client organisations, a trainer can refine learning objectives and tailor the design and delivery of training sessions to address those client group requirements.
2. Session plans should break the learning program up into as many chunks as necessary to allow learning to be managed in a way that meets learner and organisational needs. A learning program can be a single training session, a course, a single unit of competency or a whole qualification.
3. Understanding some basic learning principles, theories and styles helps the trainer understand how learners learn, and prepare training delivery strategies accordingly.
4. The fundamental principles of learning are likely to apply to most learners, and will be useful when developing a session plan and learning activities. General learning principles relate to:
   - readiness to learn
   - meaningful content
   - feedback/reinforcement
   - primacy and recency
   - active learning and multiple-sense learning.
5. Knowles's principles of adult learning offer an additional framework from which to approach adult learning.
6. Learners may have learning style preferences and may benefit from opportunities to learn in a variety of ways.

Topic 3

In this topic you will learn how to:

3A **Contextualise existing learning materials to meet learner group needs**

3B **Finalise learning materials and organise resources**

3C **Confirm overall delivery arrangements**

Prepare resources for delivery

Resources can help support you to implement your delivery plan and deliver your training session/s. These will be identified in the training and assessment strategy document.

Learning materials and support resources can include written works and hand outs (either off the shelf or developed in-house), internet-based resources or audio-visual materials. While the range of possibilities is huge, these materials may not be exactly what are required for training, so before you use the resources, you may need to customise or contextualise them.

Resources can also include the equipment, tools for practical sessions, facilities and technology you will need to make training delivery possible.

These resources are the tools you will use to support the achievement of learning outcomes, so ensure you take the time to check their suitability and availability, and allow for contingencies like breakdowns or double bookings.

3A Contextualise existing learning materials to meet learner group needs

Learning materials are the tools you and your learners will use to develop the skills and knowledge to achieve required learning outcomes. Just as units of competency may need to be contextualised to ensure relevance to learners or their workplace requirements, you should also review learning materials to determine whether they need to be contextualised so they are relevant to the needs of the learner group, organisation or client.

Access and equity

Access and equity issues are important in a learning situation. Anti-discrimination legislation requires learners to have access to an environment that does not discriminate on any basis. Avoid causing offence through cultural or language misunderstandings. In addition, you require the skills and knowledge necessary to ensure the learning process accommodates the needs of particular target groups, such as people with disabilities, Aboriginal and Torres Strait Islander people, women and people with a language background other than English.

Respond to diversity by using inclusive practices, which will help to ensure that you and your organisation do not discriminate against people. The following provides an outline of inclusive practices.

Identify needs

Develop a profile for each candidate and identify where they may require support.

Acknowledge culture

Take a candidate's cultural background into account; for example:

- don't use colloquial Australian words or phrases that may cause confusion
- contextualise learning to show there is cultural understanding
- understand cultural dress, but explain exceptions such as the requirement for a learner to wear personal protective equipment when operating machinery rather than a traditional headscarf or skirt.

Cater for disability

Recognise disability issues and make adjustments, such as providing extra time for a demonstration or using an interpreter.

Key documents

Access resources that are suitable for the group's needs and characteristics. These should be listed in the learning program documentation.

LLN specialist support

Make use of specialist LLN support and advice to:

- contextualise materials
- plan training
- conduct training sessions
- make reasonable adjustments to assessment activities.

The core TAE unit of competency *TAELLN411 Address adult language, literacy and numeracy skills* addresses ways you can do this.

Foundation skills

Address foundation skills training requirements; for example, explicitly training learners in how to complete documentation requirements of a role by providing them with an annotated example of a model text.

You can find further information about addressing foundation skills in training at these websites:

- www.serviceskills.com.au/foundation-skills
- www.awpn.com.au/resources/

Learn more

Use the internet to research inclusive practices that are relevant to the needs of your learners.

You can find out more about this at:

- www.training.qld.gov.au/providers/inclusive

Source learning materials

The learning materials you have access to may include commercially prepared materials that have been purchased off the shelf as well as materials you or someone in your organisation have developed for specific learner groups. Unless the training being delivered is quite generic, some degree of customisation is likely to be required to bring the materials to the standard appropriate to your training needs.

Examples of commonly used learning materials are:

- free workbooks or activity sheets and other materials that are available online for trainers (while generic in nature, these can be contextualised for particular learning requirements)
- audiovisual and e-learning materials
- materials developed in-house that have been contextualised for a particular learner group, but should now be reviewed to meet the needs of your specific learner group
- learning activities you have previously developed.

Contextualise learning materials

Regardless of where the materials come from, you need to review them to ensure they are compatible with learning program requirements. Your review may identify the need to:

- change the content and language so it aligns with the characteristics of your learner group; for example, learning styles or cultural background
- ensure that terminology, policies and procedures align with those of the learners' employing organisation.

Comply with requirements when contextualising materials

When contextualising learning materials, you must be aware of and comply with obligations in relation to copyright legislation. Note that even 'free' material often has copyright obligations attached to it, so read the copyright information to ensure you do not inadvertently place yourself and your employer at risk of legal action.

In some cases you will be able to easily contextualise the materials; for example, materials developed in-house that you or your organisation owns the intellectual property of. When preparing resources, follow your organisation's procedures for contextualising, which may include the following.

Required details
Outline: ▶ the title page ▶ the name of the learning program ▶ the client organisation's name, if relevant ▶ dates of training sessions.
Contextualising
Contextualise the following to suit your learners: ▶ learning activities ▶ content; for example, using workplace examples of policies or procedures that are discussed in the material ▶ terminology; for example, using the language of the particular industry/client organisation from your learners come from.

Make learning materials relevant

When you cannot redevelop learning materials to allow for contextualisation (for example, due to copyright) it may be possible to supplement learning materials with actual workplace examples. This could include discussing with learners how the content relates to them and asking them for examples that reflects their life experiences. You should always take the learners' language, diversity and workplace (if applicable) into consideration.

Here are more ideas about contextualising existing learning materials.

Theory

Example 1:

- Introduce topic from the learning resource – explain concept/theory generically.
- Ask learners how this does/could relate to them in their life or current/future job role – this could be a general discussion or a small group discussion.

Example 2:

- Develop charts that map generic terms to terms used in the organisation and refer to them constantly; for example:
  - generic term: standard operating procedure (SOP)
  - workplace term: standard work procedure (SWP).

Learning activity

Example 1:

- Explain the purpose of the learning activity – ask learners to apply the activity to their own workplace; for example, ask learners where WHS policies and procedures are found in their workplace.

Example 2:

- Explain the purpose of the learning activity – ask learners to apply the activity to their own environment; for example, identify 10 plants native to the local area using both common and botanical names.

Example

Contextualise existing learning materials to meet learner group needs

A number of training providers are asked to participate in a program to upskill Darwin residents on basic internet skills. The program caters to hundreds of people from a diverse range of backgrounds. To maintain consistency, it is decided that all training providers will use the same commercially purchased workbook.

Christine is asked to deliver training to a group of Indigenous people. She reviews the workbook and realises that while it does address the outcomes of the learning program, it is very generic and requires some contextualisation so the learners will see how the learning material is relevant to them.

Christine reads through the workbook and makes notes that she will refer to when delivering the training. She also reviews the learning activities and makes notes on how they can be adjusted. For example, one of the activities says: 'Practise using Google to search on a topic of your choice'. Christine makes a note reminding herself that before starting the activity, she should:

- ask learners what topics interest them
- demonstrate searching on one or more of these topics
- ask learners to practise searching one or more of these topics themselves.

Activity 8

1. Find a learning resource that aligns with another industry you have knowledge of or expertise in. This could be a training resource or set of instructions. Provide examples of how the text could be contextualised for a particular learner or group in this industry.

2. Review the learning resource and identify any copyright restrictions. Outline what you would have to do to contextualise the learning resource for delivery to a group of trainers in an industry of your choice.

Click to complete Activity 8

3B Finalise learning materials and organise resources

Organising a training session is similar to organising any event; there are many individual tasks that need to be completed so that the final event (the training session) runs smoothly. Follow a structured process when preparing for each session to ensure nothing is overlooked when finalising learning materials and organising facility, technology and equipment needs.

At this point of the planning process, you should be satisfied that content and requirements of the learning program and/or delivery plan are met, and should have decided on the different delivery methods and techniques you'll be using, together with any special needs resources required.

The next thing to do is to finalise your delivery arrangements. This will include making sure that the material and equipment requirements of your training session/s are available, ready for use and that you know how to use them. Avoid the embarrassment of finding out that something doesn't work – either because of equipment failure or operator error – by having a trial run in advance of the training.

Learning materials

Learning materials need to be ready to distribute to learners at the commencement of the training session. There are some considerations to take into account well ahead of your planned session.

Who is in the group?

Although you may not be able to control group size, you can take steps to know who is in your group, what their needs and characteristics are and how many people there are.

Sufficient materials

You need to be confident that you have sufficient copies of learning materials for every learner, with extra copies to allow for contingencies, such as late registration, or lost or imperfect copies. Allow time for copying if necessary.

Equipment

Resources, such as tools and equipment, need to be provided for work samples or practical sessions that require learners to make a sample.

Order materials in time

If the materials need to be purchased from an external source, establish the lead time required for ordering and dispatch, and ensure the material is still current and available.

Prepare IT resources

If you require software or learning programs, you may need to confirm licensing arrangements or workstation availability. You may need to book a computer and learn about log in arrangements.

Order of distribution

When the learning program consists of more than one session, establish whether all learning materials for the entire learning program should be organised and made available to learners at the same time. Alternatively, it is sometimes more reliable for you to control the flow of materials to learners as they need them.

Facilities

Well before training is due to commence, you should ensure that the facilities you require are:

- adequate to the group size and characteristics
- suitable for the purpose and meet WHS standards;
- booked, and that your access is assured.

If the facilities are not a venue usually used by your organisation, you may need to carry out a risk assessment to satisfy WHS policy and procedures. Confirm the procedures for risk assessments with your supervisor beforehand.

When delivery is in the workplace or in a simulated work context, there may be issues around access to the facility, or to the tools and equipment. For example, in a training kitchen you must ensure there are enough ingredients and equipment for the group.

Preparation prior to training delivery may include:

- Establish what time the building opens, or where to obtain keys/security passes and confirm any lock-up arrangements.
- Confirm access to tea/coffee making facilities.
- Ensure the availability of male/female toilet facilities at the venue.
- Determine arrangements for setting up the room; for example, make sure there are sufficient chairs and tables.
- Ensure access for learners with special needs; for example, wheelchair access.
- Ensure break-out rooms are available if these are required.

Room configuration

Facility requirements may be influenced by the audience and the subject matter of the training, and you may need to improvise or adjust delivery to accommodate shortfalls in the facility.

There may also be times when you have very little control over how a room can be configured, but you will need to plan in advance how you can create a working space for any group activities. For example, a training room that has fixed benches around the room cannot be rearranged to accommodate group activities. However, if there's adequate space, you could bring extra chairs into the room so learners can sit together in small groups to encourage discussion.

There are many different room configurations; some offer more flexibility than others. Here are descriptions of three of the most common configurations.

Configuration	Advantages	Disadvantages
Traditional classroom	▶ Useful for you to maintain eye contact with all learners. ▶ Good for self-paced or individual work. ▶ Good for presentations or lectures.	▶ Only allows learners contact with the learner on either side of them. ▶ Does not foster group discussions. ▶ Trainer could be seen as the leader and in a position of power. ▶ Trainer may not be able to see learners at the back of the room.
U-shape layout	▶ Good for whole group discussions. ▶ Good for presentations or lectures.	▶ Depending on where they are sitting, learners may have to turn to see the trainer or the whiteboard. ▶ Trainer could be seen as the leader and in a position of power.
Modular	▶ Good for small group discussions/project work. ▶ Allows easy clustering of learners with different skill levels.	▶ Communication between learners at different tables can be difficult. ▶ Learners may need to turn to view presentations by the trainer.

Technology and equipment

Technology and equipment resources should be listed on your session plan. These will vary depending on the nature of the training session and its location. When finalising delivery arrangements, ensure that the technology you require is available and working, and that you are able to use it. Check whether personal protective equipment is required and whether there are any licensing or assistance requirements if the training takes place in a high-risk environment, such as a building site.

Some key things to remember:

- Before commencing training, confirm the availability of and access to technology and equipment.
- Establish how soon before the training session you can check any equipment.
- Ensure you can operate all the technology.
- Ensure that computers (whether for your use or for learners) have all relevant software installed.
- Make sure you have any user IDs and passwords required to access computers.

- Ensure you can reset passwords in case learners accidentally lock themselves out; for example, by multiple attempts to log in incorrectly.
- Make sure you know how to safely and correctly operate any machinery or equipment – this is important to meet WHS requirements.
- Ensure you know who to contact if equipment fails.

Resources, equipment and support services available for learners with special needs

Learner groups may include people with a particular disability, learning difficulty or cultural issue who need extra support. Specific resources, equipment and/or support services may be available for learners in your group that have special needs. Learners who have a disability have a right to participate in education and training. The companion volume implementation guide accompanying a training package includes a statement and advice about access and equity provision.

Building rapport with learners makes it more likely that they will share information with you that they may not have provided when enrolling in a course; for example, a learner may inform you that their back gets sore after sitting for a long period of time, and they would like to stand for periods during a training session or use a standing desk.

Resources to support people with special needs include:

- Memory aids (posters, notes, etc.)
- Voice synthesisers and voice-to-text programs
- Plain English documents or documents in other languages
- Interpreters, including sign language (Auslan) interpreters
- LLN support
- Telephone typewriters (TTY)
- Additional scheduled breaks or extra time
- Audio loops for people using hearing aids
- Mentor, tutor or support person
- Document holders and adjustable tables
- Personal computers and computer programs
- Wheelchair access
- Podcasts and audio files
- Braille translations
- Accessibility options; for example, enlarged computer screen images

Use an equipment checklist

Since there can be many pre-delivery tasks to consider to ensure the smooth running of training sessions, consider using a checklist that helps to keep the event planning on track so nothing is inadvertently forgotten.

Your pre-planning should also confirm that you have available all the stationery and any miscellaneous items you may require.

You may need access to the following items:

- digital file
- hardcopy learning materials
- flip charts and flip-chart paper
- whiteboard markers and erasers
- stationery items, such as notepads, pencils, pens, adhesive tape, staplers and staples
- rewards or prizes for learning activities.

Your training session is more likely to run smoothly if you have applied a systematic method of ensuring that all requirements have been planned and organised. As far as possible, identify likely risks in your contingency plan so there is a strategy for managing each scenario.

At the end of each training session, take the time to reflect on how the preparation of resources eventuated and what learning you can take from the session so that the next session runs even more smoothly.

Example

Finalise learning materials and organise resources

Samantha is asked to deliver an internal training session on behalf of Warren, a trainer who has fallen ill.

The session is due for delivery in two days' time. Samantha knows the content very well and is comfortable about accepting this request. She also knows that Warren is very careful about checking and confirming all logistical considerations and is at first tempted not to double check; however, Samantha nevertheless decides to review Warren's file.

Warren has used the organisation's standard training preparation checklist as a guide to planning and ensuring that logistics are organised. All appears to be in order and Samantha notes that training is due to commence at 8.30 am on the 19th floor of the building she is located in. Samantha realises that, while Warren and the learners have access to this floor, she does not.

She then requests a security pass to that floor so she can prepare the training room an hour before the first session.

Activity 9

Undertake one of the following:

- Develop a checklist that can help to ensure that all logistical considerations have been identified, such as learning materials, facilities, technology and equipment needs. OR
- If you already have a checklist in your workplace, analyse it for completeness and make recommendations for improvement.

Click to complete Activity 9

3C Confirm overall delivery arrangements

The final stage before delivering the training session involves making sure that everyone knows what is happening and what they are responsible for. By this stage, you should have planned and organised most of the work; however, there may be some last-minute confirmations to complete in order to avoid unnecessary complications.

You should raise any policy or procedural issues and WHS concerns related to the learning environment with the relevant people, and decide on an outcome in advance of training commencing.

Confirm logistics

Your pre-training checklist should have helped you to finalise many of the arrangements; however, in the final day/s leading up to the training, you may need to confirm important arrangements.

In your final check, confirm that:

- any rooms or venues are actually booked and not double-booked
- IT requirements have been met
- materials are printed and/or available.

Review stakeholder information

Updating and maintaining stakeholder and client details will also contribute to the smooth running of training that takes place in a workplace or RTO.

The people you may need to consult with in the final stages could include:

- HR officers, managers, supervisors or case workers who interact with or who have an interest in the learner/s and the learning program
- IT or technical support people
- building security staff
- administration staff.

You may have touched base with some of these people when establishing logistical details; however, you may need to consult with others to confirm final details about learner numbers or to provide stakeholder with final confirmation details of the training.

Once again, having a checklist is a useful tool to monitor what needs to be done and when it needs to be done by. Taking the time to re-confirm any arrangements that are already in place contributes to good contingency management.

Example

Confirm overall delivery arrangements with relevant people

Shane's training session is to commence in two days' time. Everything has been carefully planned and organised.

The week before the scheduled training, Shane confirms the final arrangements:

- the training workbooks have arrived; Shane plans to take them to the training room himself
- each workbook is checked to make sure it contains an accompanying activities DVD
- the learners are all from the one organisation; there are no additional places required or available
- a specialised computer training room with the required software has been booked months in advance and is available for the day.

Two days before the training, Shane calls to remind IT support of the training and to confirm that the required number of computers will be available. Shane is shocked to learn that the room has been double booked and is required by institute management for the day. It is suggested he shift his training session to another room.

Shane resists this, stating that he has clearly articulated from the outset exactly what the requirements were. He contacts his head of department to resolve the situation.

Activity 10

Observe, participate in or discuss two group-based learning sessions with a trainer who has formal training qualifications.

1. In relation to each learning session make a list of:
   - the logistical details that have had to be checked and confirmed
   - any policy, procedural, WHS or special needs requirements
   - any stakeholders who would have an interest in the training, and therefore may have received confirmation of or other details about the sessions.

2. Indicate what you would do with this information if you were running the training.

Click to complete Activity 10

Summary

1. Review learning materials to establish any contextualisation requirements to ensure relevance to learner needs. Where you cannot customise learning materials for copyright or other reasons, you should seek alternative means for ensuring their relevance to learners.
2. Following a structured process when preparing training sessions helps ensure that nothing is overlooked when finalising materials and organising facility, technology and equipment needs.
3. Logistics are generally organised some time before the training session, so it is important to verify and confirm all details a few days before the session.
4. Using a checklist will help to ensure that all the logistics and stakeholder confirmations you need to attend to are completed in advance of the training.

Topic 4

In this topic you will learn how to:

4A **Conduct each session according to the session plan, modifying where appropriate**

4B **Use the diversity of the group to support learning**

4C **Employ a range of delivery methods to optimise learner experiences**

4D **Demonstrate effective facilitation skills**

Deliver and facilitate training sessions

Due to the diverse nature of all learners, you need many different skills to be able to deliver and facilitate effective training sessions. Skills are developed and honed through experience, so you should practise, follow the guidance of experienced practitioners and seek to constantly improve your skills as a trainer. At the end of each delivery session, pause to reflect on what worked and what didn't work, and use this as a means of improving the way you provide learning experiences.

To be effective as a trainer, you should use a range of techniques and methods, including the dynamics of the group itself, to support learning. Once again, experienced trainers can be one of your most important resources as you continue to practise your delivery skills.

Finally, effective trainers are well-prepared trainers. Not only does this mean ensuring you have all the required resources at hand, but also that you plan your sessions in advance and tailor them to the needs of the learner group.

4A Conduct each session according to the session plan, modifying where appropriate

The session plan is your guide for delivering the session. While it's the blueprint for delivery, you also need to be ready to respond to triggers that alert you to the need to modify your session plan. Observing learner interactions (for example, their body language, response to questioning and reaction to learning tasks) will often provide clues about the effectiveness of delivery and whether your session plan needs to be modified.

Facilitating a session does not mean delivering a lecture. It means that you will set up the session or organise learning by establishing the goals of the sessions and what the learners already know. This is generally the starting point, and you can use the knowledge and experience of your learners to lead the way. This provides learners with confidence, engages them and enables you to adjust the plan. A good session plan will have a variety of activities to provide input, an opportunity to practise or discuss the concept, and activities aimed at consolidating or reviewing what has been learnt.

Ultimately, no matter how good your session plan is, your interpersonal and communication skills will help to ensure the training achieves its objectives. You may need to modify the way you go about things according to different learners and different learning situations, but you always need to communicate effectively.

Communication skills

Since face-to-face training and learning remains a key element of most training delivery, effective communication skills are often vital to the learning program. Learners are attending your training sessions to acquire, develop or update skills and knowledge; in some cases, what they learn through your training/facilitation is crucial to their job role. In this context, oral communication between yourself and your learners is key.

Here is a summary of key aspects of verbal communication and tips to keep in mind when training.

How you say the words	Are you using language that is appropriate for the learner? Have you contextualised your language so it is appropriate to their situation? **Training points** Use language that: ▶ is culturally appropriate ▶ shows you understand the learners' background ▶ is free of unfamiliar jargon or concepts.

Pitch, tone, volume, speed and diction	Be aware of how you say words: ▶ Pitch: this refers to how high or low your voice sounds to listeners. ▶ Tone: a speaker's attitude to listeners or to subject matter can be heard in their tone. It is important to convey respect for listeners in your tone. Listeners can also learn something about what you consider to be important and unimportant from your tone of voice. ▶ Volume: speaking in a low volume means some learners will not be able to hear you. ▶ Speed: speaking too quickly means that some listeners will find you difficult to understand and may miss instructions. ▶ Diction: this is about how clearly the words are spoken. **Training points** ▶ Speak naturally. If you are delivering to a large group in a large room, use a microphone rather than shouting. ▶ Speak clearly and face the learners while speaking: – don't mumble or talk while facing the whiteboard – be aware of complementary forms of communication, such as your facial expression or the shape of your lips and mouth as you speak – this helps learners understand what you are saying ▶ Be aware of your speaking style, tone and pitch: – if your voice is monotonous you may bore the learners – if you continually use fillers such as 'um' and 'ah', learners could soon focus on counting these utterances rather than on what you are saying!
The context in which you use the words	**Training points** When you are explaining concepts to learners, frame them in a way that is meaningful to learners; try to relate concepts to their work or life experiences. This is an important way of engaging the interest of learners.

Trainer as a role model

As a trainer, you should model communication standards. Be empathetic, but also model the use of standard Australian English in the training room, both in the way the sessions are led and to maintain a good standard for written hand-outs and notes. For example, it may be tempting to use colloquial language when training a group of unemployed youth; however, using this language will not assist them in learning the cultural norms of the workplace. Balance the use of empathetic language with being a good role model.

Remember, you are responsible for ensuring the message you are trying to impart is received by the learner in a way that makes sense to them. One way of imparting the message effectively is to develop and use questioning techniques that effectively probe learning.

Develop rapport

As a trainer, you have a professional role and you need to have an understanding of appropriate boundaries to maintain. Think about the following: would it be appropriate for a trainer to employ a person in their learner group to provide babysitting services to their children? Why/why not?

It is important to develop a relationship with learners that is professional and respectful, but which also involves trust and rapport.

Here are some tips for developing effective relationships:

- Learn names as quickly as possible.
- Show integrity. If you tell learners that you will do something by a certain date, ensure you do it.
- Develop a code of conduct together on for example one person speaking at once, lateness, phone usage, etc.
- Demonstrate competence.
- Be positive.
- Use humour where appropriate.
- Get to know learners and share information about yourself when it is appropriate.
- Show empathy and try not to judge.

Active listening

Active listening is more than just hearing what a person says. Good listeners are attuned to the speaker's body language, tone of voice and the words they use. You should also rephrase to the speaker what they have said to show your understanding.

Understanding what to say, how to say it and the types of questions to ask is a great starting point in developing good communication skills, but active listening skills remain the key to good communication.

There are a number of things you can do to improve your listening skills – here is a list of some along with examples of their practical application.

Stop talking

- Trainers tend to be very passionate and enthusiastic when delivering training, so much so that sometimes they will ask a question and then immediately answer it themselves! Pause from time and time and allow learners to think about what you have said.

Wait for the learner to finish speaking

- Give the learner the opportunity to finish their response before interrupting them by asking for clarifying comments. Avoid interrupting the learner by correcting their grammar, terminology and so on.

Acknowledge all comments/questions

- All input from learners is valuable – you just need to determine how to interpret it so you can respond positively.

Questioning skills

There are many different types of questions you can utilise to provide the opportunity to determine whether the learner has understood what you have communicated.

Asking questions also provides the opportunity to:

- develop rapport and a good relationship with your learners
- motivate learners by using their responses as an opportunity to recognise their contribution and reward correct responses or efforts
- ask contingency questions; for example, 'Why it is important?'; 'What would happen if...?'
- clarify learning points or learner needs.

Types of questions

Be mindful that you may need to rephrase or restructure questions so they make sense to all learners.

At different times, each of the following question types may be the most effective.

Open questions

- Open questions require more than a one-word answer. Ask learners when you would like them to provide a more detailed response; for example, after you have provided a scenario and asked the learner how they would respond to it.
- This type of question can be effective in engaging learners in discussion as they can invite all learners to reflect and contribute their opinions or experience. Learners may have scope in the way they answer an open question.
- Open questions are also effective for brainstorming and problem solving.

Closed questions

- Use a closed question when you would like the learner to provide a definitive response; for example, 'Look around the room and tell me one thing that could lead to a WHS issue.'
- They can be useful to check that learners have understood something.

Probing questions

- Probing questions ask the learner to expand a little more on their initial response; for example, 'Your answer is right, but how do you think that could be implemented in your workplace?'

The APPLE technique

Using this technique of questioning is effective in training.

A	Ask the question (preferably an open question). Don't ask trick questions.
P	Pause. Wait a moment so the learners can digest and comprehend the question. Avoid the temptation to ask the question and then immediately answer it.
P	Pick a learner to answer the question. Ask for a volunteer or choose a learner to actively encourage them to participate.
L	Listen to the learner's response – don't interrupt them.
E	Elaborate: provide additional context or information around the learner's response, after first acknowledging their response in a positive manner.

Advantages of using good questioning techniques supported by active listening

Good questioning techniques supported by active listening will assist you to monitor learners' skill and knowledge development, both during a training session and throughout the course.

Effective questioning and listening enables you to:

- establish the extent and depth of a learner's knowledge (i.e. find out what they do and do not know)
- find out about learners' needs; for example, whether they need encouragement or additional assistance to complete learning activities
- determine whether there have been any misunderstandings or incorrect assumptions
- determine a learner's progress
- determine a learner's readiness for final assessment.

Cross-cultural communication

Questioning is a key technique in Western education; however, be aware that Indigenous learners and learners from some other cultures may not respond well to direct questions. Isolating an individual in the group can be perceived as rude or intimidating, and may lead to feelings of shame and possible withdrawal from group participation. For example, warning a learner that they need to say something about their work when they have finished, rather than "springing" it on them a surprise.

Effective training involves:

- adequate preparation to teach different learner groups
- ongoing monitoring of learner participation
- encouraging participation and positive feedback
- modifying an approach, where appropriate.

Conduct training sessions

Your session plan provides a structure to enable learning outcomes to be achieved within the time available. It includes signposts for how learning and practice of skills is to take place, but it needs to be flexible rather than rigid.

In all likelihood there will be two key non-negotiable items in your session plan:

- the learning outcomes that need to be achieved
- the overall amount of time you have to support the attainment of learning outcomes.

The rest of the information on your session plan is negotiable; it can and should be adjusted whenever necessary. For example, a common delivery issue that arises is an activity or session running overtime. In these and other circumstances, you will have no alternative but to review and re-prioritise your session plan to accommodate the key learning points.

Manage changes to session plans

You may need to adjust the way you are running a training session for a number of reasons. Make allowances for the following situations arising during a session.

Disengaged learners

To effectively manage changes to session plans, you should develop acute observation skills to monitor individual and group progress. There will be occasions when the behaviour and body language of group members tells you that you need to make changes to the way the training session is being delivered to engender better group participation. Understanding your learner group profile will help you with this as you'll be more attuned to group needs. For example learners may have already covered a similar topic or may not have the basic fundamentals to follow the session.

Unexpected contingencies

No matter how well prepared you are, you won't be able to anticipate every likely contingency. For example, there may be an unexpected fire drill, the network may be lost, a learner may faint or there may be a power blackout. Experience and a thorough knowledge of the learning program and learning areas will be your best guides to how to modify your session plans when unexpected events occur. If you are clear about the learning goals and outcomes to be achieved, you will be able to capture the essential learning points in other ways.

Progress is too fast or too slow

During session breaks and at the end of each session, you should evaluate learning progress against session time lines. If your learners are ahead of schedule, you may need to devise additional activities or challenges for them. Likewise, to catch up on lost time, you may need to strip back learning in some less crucial areas or devise a way of pulling together learning threads.

Example

Conduct each session according to the session plan, modifying where appropriate

Melanie is asked to deliver a trainer-led session, 'Introduction to Excel'. She is well prepared and has a detailed session plan. Melanie knows that some learners will progress more quickly than others, so she develops a number of activities at different levels so that all learners are able to complete the basic activities.

Melanie asks learners to complete a self-assessment at the beginning of the session. The self-assessment reveals that 8 of the 10 learners already have some basic knowledge of Excel. The other two learners have not used Excel at all, but do have knowledge of Microsoft Word, so Melanie will use this to point out similarities between the software programs. There's also some internal politics at work that Melanie can't ignore: some of the learners are supervisors.

Melanie restructures the session so that at predetermined points she brings all learners together to demonstrate key concepts. Learner workbook tasks are used as learning activities for the two novices and as revision for the remaining group members who have some knowledge. Members of this latter group are more self-directed in their learning, so Melanie provides them with more detailed and challenging extension activities.

Although Melanie intends to continue this process for the duration of the session, she nevertheless takes the time to ask learners if this training method meets their needs. Their feedback suggests they enjoy the flexibility of being able to work at their own pace, but still interact with others to ask for assistance.

Activity 11

1. With an experienced trainer who has formal training qualifications, discuss two examples of situations where they have had to modify a session plan. Document these two scenarios, explaining:
   - why the trainer needed to amend the session plans
   - how the session plans were modified
   - whether delivery methods/techniques also changed
   - what effect this change had on the learning program/session outcomes.

   Your response should make reference to learning theories, learning principles, and learner needs and styles as appropriate.

2. Discuss with the trainer what they may have done differently with hindsight.

Click to complete Activity 11

4B Use the diversity of the group to support learning

The learners in your group will come from a range of different backgrounds and experiences. They also bring with them a variety of skills and knowledge, and are likely to learn differently and at different rates.

Learners may:

- have different work and general life experiences
- be of different ages, ranging from young adult up to retirement age or beyond
- take on different roles in the group, depending on whether they are shy or outgoing, leaders or followers
- prefer to participate and learn in different ways
- be from different social, cultural, ethnic and religious backgrounds
- have different levels of existing knowledge/skills relating to the learning outcomes.

Acknowledge and use diversity

One of your immediate challenges as a trainer is to identify the group diversity and understand how this diversity can be harnessed to provide a richer learning environment for everyone. Here are examples of how you can use group diversity to acknowledge and show respect to the individuals in your group.

Different work–life experiences

- Encourage learners to explain how their experiences relate to the learning outcome.

Different age groups

- Group people according to age so that learners can more readily understand the 'language' of their age group.

Personalities

- Allow natural leaders to lead group activities and ensure that everyone in the group participates.

Learning styles and preferences

- Provide different learning activities and allow learners to select which one they prefer.

Different social, cultural, ethnic and religious backgrounds

- Schedule breaks (where possible) to allow for required religious activities; for example, prayer times.
- Use examples and learning activities that learners can relate to; for example, in case studies avoid only using Anglo-Saxon names, places and products.

Different levels of knowledge/skills

- Partner a more experienced person with a less experienced person. Ask experienced people to demonstrate or explain how they have applied theory/practice.

Levels of skills and knowledge

Learning program documentation, such as a training needs analysis and enrolment forms, may provide a certain amount of information regarding individual learners. However, this information is not always available to the wider learning group and it may not always help you to understand and manage group dynamics and interactions.

Even in a diverse group, there can be commonalities. Conversely, diversity can exist in a seemingly homogenous group. A group can also be homogenous in the sense that its members are all new to the skills and knowledge to be developed through the training; for example, when a work group is brought together to learn software or a new method that none of them have used before. Despite this common thread linking the learners, there will still be a level of diversity brought about by different learning styles, intellectual capacity or life experiences that may be relevant to the learning.

Identify and use group diversity

Group diversity involves culture, gender, education, skill level, life experience, etc. Diversity can also include individual personality and behaviour patterns.

People tend to adopt roles when in groups. Meredith Belbin, a management theorist, has found that people commonly adopt one of nine roles in a group or team. You can learn more about Belbin's nine roles at:

- http://belbin.com.au/team-roles

An awareness and understanding of roles may help you use the natural strengths and behaviours of learners to support an effective learning environment. For example, you may wish to try to achieve group balance and avoid placing several 'coordinators' together in a small group of learners. Appointing learners to fit certain roles can build their skills and confidence.

Stages of group development

To maximise the benefits of working with a group, you may also find an understanding of the stages groups go through useful. Psychologist Bruce Tuckman identified four stages of group development.

Stages of group development

1 Forming
Getting to know each other, avoiding conflict.

2 Storming
Learners learn to work with each other, understand each other's skills and weaknesses, and establish rules and roles. Often in this stage the diversity of the group is identified and team members learn to utilise this diversity to agree on roles and work division.

3 Norming
In this stage learners accept their roles and get on with the activity, task or learning to be completed within the boundaries of the rules they have established.

4 Reforming
This stage is usually achieved by a group or team that has worked together for a long time and can work seamlessly and independently, through trust and understanding.

Develop a sense of belonging

You should gather some knowledge about group structure and diversity early on – this will benefit both you and the group. Using icebreakers, training games and other introductory activities at the start of a training program will allow you and group members to learn about each other. Once everyone knows a little about each other, use what you have learnt about the group's individual and collective experience and knowledge, together with your understanding of adult learning principles to add to the learning experience.

As a trainer, you need to ensure that everyone has a sense of belonging to the learning group, and that everyone has the opportunity to share and interact in the learning experience in a positive way. In particular, you will need:

- observation skills that alert you to the way group dynamics are operating
- the capacity to maintain relationships and foster inclusivity in the program.

You may also need to adjust your own delivery style and techniques to suit the needs of the group.

A group training session can be made more comfortable for all learners if expectations are developed at the beginning of a course or session. Rules, such as mobile phone use, can be outlined or negotiated so that they do not result in confusion or friction later on.

Example

Use the diversity of the group to support learning

Adriana is the trainer for a coffee-making course that is aligned to a unit of competency in SIT30616 Certificate III in Hospitality. Adriana identifies some people from the class list who appear to have different cultural backgrounds. While running icebreaker activities at the beginning of the course, she discovers there is in fact quite a rich range of cultural experiences in the group.

Later, once Adriana has established her own understanding of personalities in the group and the participants themselves are comfortable with each other, she will get the group members to talk about their different cultural experiences related to coffee. Part of the learning experience for the group will be for individuals to prepare coffee in the style of their cultural or ethnic background and to explain to the group what part coffee plays in the social experience.

Activity 12

1. Review the adult learning principles discussed in Topic 2. Develop activities that address each of the principles and that draw on diversity in the group as a resource.

2. Using examples, explain how adult learning principles can help you understand how to use the diversity within the group as a resource to support learning.

3. Identify the elements of diversity in a group of learners or potential learners in your workplace. Suggest how you could use that diversity as a resource to support learning.

Click to complete Activity 12

4C Employ a range of delivery methods to optimise learner experiences

The delivery methods you choose need to provide a learning experience that motivates and engages learners, providing each individual with the opportunity to participate. The methods you use must also ensure learning outcomes are met. The key to successful delivery is to use a variety of methods to keep learners interested, actively involved and challenged. You must also ensure that you cater for different learning styles and learner needs.

Delivery methods

There are many effective delivery methods that can be used throughout a training program. In most instances of face-to-face or trainer-led delivery, you should use a range of methods so that learner experiences are varied, interesting and challenging. Often certain methods lend themselves better to particular topic areas; for example, role-plays are a popular choice for practising and reinforcing communication skills.

The following table summarises the advantages and disadvantages of different instructional methods, as well as considerations when using these methods.

Method	**Advantages**	**Disadvantages**	**Comments**
		Informational	
Presentation	▶ Conveys a large amount of information. ▶ Fast and efficient. ▶ Forum allows exploration of content in more detail.	▶ Audience is largely passive.	▶ Presenter should be an interesting speaker, be able to self-limit and stick to time and facilitate questions effectively. ▶ Can involve use of slides with information presented visually. ▶ Learners may be required to take notes or summarise information.
Debate	▶ Provides different points of view; thought-provoking.	▶ Audience is largely passive.	▶ Leader must express solid set of ground rules and have skills to enforce them.
Audiovisual (for example, a film, documentary, video clip or television training channel).	▶ Reinforces content. ▶ Content may be imbedded in narrative, which is more entertaining. ▶ Flexible to start and stop for discussion.	▶ Audience is largely passive. ▶ Possibility of equipment problems.	▶ This method is not appropriate early in a session. ▶ Always introduce and debrief audiovisual materials.
Discussion: ▶ group discussion (of given topic) ▶ buzz groups (short, time-limited discussion on given subject)	▶ Keeps participants interested and involved. ▶ Resources can be discovered and shared. ▶ Learning can be observed. ▶ Participants are active; offered chance to hear other points of view. ▶ Participants can express their viewpoints and ideas.	▶ Learning points can be confusing or lost. ▶ A few participants may dominate the discussion. ▶ Time control is more difficult.	▶ Groups of 4–6 people are most effective; the small group then has a short time to discuss a topic or solve a problem. ▶ You should be able to give clear instructions and keep discussion on target; your main task is to judge when to cut off discussion.

Method	Advantages	Disadvantages	Comments
Brainstorming	▶ Can get all participants involved in collecting a lot of information. ▶ Can quickly generate ideas. ▶ Good for problem- solving. ▶ Allows all to participate. ▶ Validates the ideas of the group. ▶ Offers a quick change of pace.	▶ The problem/issue must be clearly defined. ▶ Time control can be difficult. ▶ Clear trigger questions are required. ▶ Need to set aside time for evaluation/ discussion afterwards. ▶ Potentially over- used method; requires careful facilitation.	▶ All participants present many ideas as rapidly as possible on a problem or issue. ▶ Group organises list into categories for discussion. ▶ Avoid evaluating, criticising, omitting, or discussing contributions until all are written. ▶ Record in contributor's own words.
Reading (alone or aloud)	▶ Saves time (learners can generally read faster than trainer can talk). ▶ Material can be kept for later use. ▶ Insures consistency of information.	▶ Participants can lose interest if used too long without interruption. ▶ Participants read at different paces; may affect those with language, literacy and numeracy (LLN) issues. ▶ Difficult to measure how well people are learning.	▶ Written material is used to present new information to participants. ▶ Requires skill to select relevant material. ▶ Depends on reading skills of participants.
Drawing or doodling	▶ Thought-provoking warm-up activity; good for making thoughts and opinions more concrete. ▶ Offers another channel for learning. ▶ Good for visual learners. ▶ Aids memory and engagement.	▶ Requires participant self-direction.	▶ Need to relate to relevant learning goals.

Method	Advantages	Disadvantages	Comments
Task groups	▶ Sustained interaction allows quieter people to express themselves and validates participants.	▶ Can be time-consuming. ▶ Requires a great degree of self-direction and group maturity.	▶ Keep groups small and diverse with sustained interaction and clear purpose.
Behavioural			
Role-play	▶ Helps retention. ▶ Allows participants to practise new skills in a controlled environment. ▶ Participants are actively involved. ▶ Observers can influence attitude and behaviour.	▶ Requires preparation time. ▶ May be difficult to tailor to all situations. ▶ Needs sufficient class time for exercise completion and feedback. ▶ Requires maturity and willingness of groups; trainer requires excellent facilitation skills.	▶ Participants act out problem-solving situations similar to those they will encounter in the workplace. ▶ You need skill and understanding to adminster this (must get people into roles, give directions, establish a climate of trust). ▶ You need insight into how an activity may pose a threat to some individuals. ▶ Use in a well- formed group.
Simulation games	▶ Intense involvement. ▶ Allows participants to practise problem-solving and decision-making skills.	▶ Can be very competitive. ▶ Requires a game and possibly a consultant to help facilitate. ▶ Can be time-consuming.	▶ A package game requires preparation time for the leader to learn the rules and directions.
Recording: ▶ tape-recording with playback ▶ video-recording with playback	▶ Very concrete learning tool. ▶ Participants are involved in judging own performance.	▶ Criteria must be clear. ▶ Learners know that assessment is based on specific behaviours. This can mean performances can seem distorted and staged. ▶ Requires equipment.	▶ You should establish the purpose and performance criteria clearly.

Method	**Advantages**	**Disadvantages**	**Comments**
Case study: ▶ problem situations for small groups to analyse ▶ critical incident (small section of case stating most critical or dramatic moment) ▶ letters or memos are given to participant for response	▶ Requires active participant involvement. ▶ Can simulate performance required after training. ▶ Learning can be observed. ▶ Opportunity to apply new knowledge and practise skills.	▶ Information must be precise and kept up to date. ▶ Needs sufficient class time for learners to complete the case study. ▶ Participants can become too interested in the case content. ▶ Case study must be relevant to learner needs and daily concerns.	▶ Participants are given information about a situation and directed to come to a decision or solve a problem concerning it. ▶ Trainer needs to have skills and knowledge to 'solve' the problem; may need to compare approaches of several groups and reinforce best solutions.
Demonstration (with or without practice by participants)	▶ Assists comprehension and retention. ▶ Stimulates participant interest. ▶ Can give participants a model to follow. ▶ Allows optional modelling of desired behaviour/ skill. ▶ Can be active. ▶ Good for learning simple skills.	▶ Must be accurate and relevant to participants. ▶ Written examples can require lengthy preparation time.	▶ Participants are shown the correct steps for completing a task or are shown an example of a correctly completed task. ▶ This method is more effective if participants are active. ▶ Feedback must follow immediately after practice. ▶ Requires skill to model desired behaviour; break procedure down into simple steps.
Skills practice lab (small participant groups practise together)	▶ Different points of view and feedback. ▶ Participants are active. ▶ Good for translating information into skills.	▶ Group should have enough knowledge or insight to coach each another.	▶ Can act as a resource to groups.

Method	**Advantages**	**Disadvantages**	**Comments**
		Planning	
Group task: ▶ group discussion with decision-making regarding a new action ▶ individual or group planning session with report	▶ Validates maturity and needs of group members; members have best insight into their problems and on-the-job needs. ▶ Groups get ideas from one another. ▶ Group leaves session with practical, constructive and mutual goals.	▶ Requires a mature group that can self- direct and stay on task. ▶ Can be time-consuming.	▶ Leader serves as resource once directions are given.

Adapted with permission from material in the toolkit at ITECH – International Training and Education Centre on HIV http://www.go2itech.org/HTML/TT06/toolkit/delivery/methods.html

Select delivery method

Before selecting your delivery method, you should consider how the method fits with program objectives and the nature of the topic, and review the method's suitability to learner styles and your own delivery style. Here are further points to think about.

Your own experience

- How comfortable are you with that method? If you haven't had experience with a particular method it may be best to talk to other trainers about its features before you try it.

Time available

- Consider the time available and choose methods that are time-efficient, but still allow for variety.

Learner characteristics

- Be mindful of learner characteristics, needs and styles, particularly learners who experience real or perceived LLN issues. You may need to seek advice from an LLN specialist about effective delivery techniques to address these issues.

Need for variety

- Wherever possible provide variety and cater for individual needs. For example, not all learners enjoy group discussions, and learners may prefer to be active in the afternoon as their concentration wanes.

Use different delivery methods

Remember, what really counts is the learner, and providing them with every opportunity to develop the skills and knowledge that are the focus for the learning session. This means you should adapt or modify delivery methods to better meet your learners' characteristics and the environment in which you are delivering training.

Regardless of the delivery method used, you need to motivate, guide and support learners. You need good presentation skills so that whether you are giving instructions, presenting ideas and information or giving a demonstration, you do so in a way that engages learners, gives them a positive learning experience and offers every opportunity to participate in learning. You also need to be able to monitor groups and manage relationships in a way that ensures the inclusion of all learners in the program. Once again, effective communication skills are essential.

Guidelines for using common delivery methods

A range of delivery methods are available to choose from, but you need to think about why and how a method can provide learners with a meaningful learning experience, pitfalls to avoid and how to provide resources required by the method.

You need to develop strategies that ensure multiple delivery methods are used to maximise the learners' engagement.

Here are considerations for using common delivery methods.

<table>
<tr>
<td>Role-play</td>
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Role-plays can be used to demonstrate/examine a behaviour/situation/problem and the preferred solution. There may be role-play cards that specify the characteristics and behaviours that must be demonstrated.
Make sure all learners understand the purpose of the role-play.
Suggestion 1:

Have learners choose their own cast.
Allow time for practice.
Role-play is performed.
Facilitate a discussion by asking the group questions that draw out the intended outcomes of the role-play.
Facilitate a discussion by asking the group how the situation/behaviours demonstrated in the role-play could be adjusted to allow for a better or different outcome.

Suggestion 2:

All learners to choose their own cast.
Role-play is performed.
Facilitate an activity to compare situation/behaviours from first role-play to that of second role-play.
Facilitate an activity asking group to nominate how the outcomes of the second role-play could relate to their own work environment, if relevant.

Considerations:

Ensure that the role-play is relevant to learners; for example, aligned to a particular industry or organisation.
Depending on time, you could ask all learners to participate in the role-play by forming small groups.
You may wish to restrict the time allowed for practice and performance; for example, 10 minutes to practice, five minutes to perform.
Some learners do not enjoy role-plays, so avoid insisting (unless role-plays are a requirement of the learning outcome) and suggest they could be observers with a checklist to give feedback on what did and didn’t work well.
If the whole group is not involved, decide what the remainder of the group will do while the performers are practising.
To reinforce learning, document key points on flip-chart paper adhered to training room walls; for example, existing behaviours/situation/problem; preferred behaviour/situation/solution, etc.

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Project-based learning	Project-based learning is a strategy in which learners work on a given problem, task or research activity, either individually or in small groups. Ensure learners understand the requirements of the project; if learners are working in a group, ensure team members understand what is expected of them. **Considerations:** ▶ If possible, give learners a choice of projects. ▶ If possible, give learners a choice of working in small groups or individually.
Presentation or lecture	Presentations are useful methods when you need to explain theories or provide information. **Considerations:** ▶ Lectures are unsuitable for most VET courses, which centre on applied learning. ▶ However, training sessions often include a short presentation of key information followed by learning activities.
Facilitated group discussion	In a facilitated group discussion, the trainer/facilitator leads the discussions and continues to prompt, encourage and direct the discussion to address the topic at hand. Take these steps: 1. Pose a question. 2. Ask for volunteers to respond to the question. 3. Document key points on flip-chart paper adhered to the training room wall. 4. Thank all participants for their responses and summarise discussions/outcomes. **Considerations:** ▶ If no one responds, wait – learners need time to think about the question and their response. ▶ If you are silent long enough someone is likely to speak up – if not, re-pose the question in a different way, perhaps structuring it within a scenario relevant to learners. ▶ Accept all responses, even when the response is not the one you were seeking; for example, ‘Thanks James – what do others think?’ ▶ If learners are not being responsive, ask them to first discuss the question in pairs and/or write a response to the question; then you can either ask learners to read out and explain their response.

Task/skill demonstration	Demonstrations are useful methods when learners are learning a new skill; for example, how to use computer software. 1. Explain to learners what the demonstration will show. 2. Demonstrate the end-to-end task. 3. Break the task up into smaller tasks. 4. Demonstrate the first section of the task. 5. Allow learners to ask clarifying questions. 6. Respond to questions. 7. Ask learners to practise the first section. 8. Assist individual learners as required. 9. Demonstrate the first section again. 10. Demonstrate the next section, explaining the link between the first and second section. 11. Repeat from Step 5. 12. When all steps have been demonstrated and practised, demonstrate the entire task again. **Considerations:** If learners appear to be unable to complete each section, determine whether you are demonstrating it too fast for them to understand or whether some sections needs to be split into smaller sections. If learners are distracted or talking among themselves, it could mean that the sections are too small or you are demonstrating too slowly; this is likely to be the case if learners already have some experience with the skill/task being demonstrated. When assisting learners, avoid doing the task for them – instead, encourage and provide step-by-step instructions.

Example

Employ a range of delivery methods to optimise learner experiences

Olga's organisation has put in place a new system of performance appraisals that requires training in their use for all supervisory and management staff, and awareness training for production and administrative employees.

Olga's first group is a group of managers. The managers understand how to do performance appraisals and the purpose of them; however, the process they are required to follow has changed. Olga uses the following training methods in her presentation.

Methods used in performance appraisal training session

PowerPoint presentation

PowerPoint slides progressively build and compare the two performance appraisal methods. Visual learners can see points of comparison and contrast.

The group also receives a copy of the final slides that show full details of the new system and summarise the changes.

During the presentation, Olga provides up-front information on why the changes are occurring and the benefits to the organisation, management and staff.

Demonstration

Olga demonstrates the end-to-end process: how to log into the new system and what managers need to do, using a simple scenario.

As she progresses through the demonstration, Olga refers to the PowerPoint slide, showing the complete process so that learners can align what they are required to do with the process they are to follow.

Practice

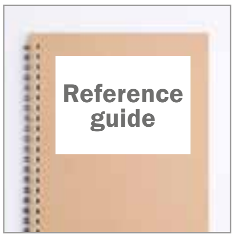
Olga then provides the group with a number of scenarios and asks them to practise using the new system. Learners can work individually or in pairs to complete the tasks.

Brainstorm and discussion

Olga asks the learners to brainstorm, and discuss strengths and weaknesses of the new system, focusing on strategies to deal with any likely flaws or problems.

Review

Olga concludes the session by presenting a review of policies and procedures the managers must adhere to.



Reading/reference

Olga provides managers with a quick reference guide to the system.

Activity 13

1. Make a list of five different delivery methods you have had experience with, either as a learner or a trainer. Provide a brief profile of the learner groups these methods were used with; mention their characteristics, needs and learning styles.

2. Explain the advantages and disadvantages of these methods in relation to your current learner group, or a learner group you are familiar with.

3. What kind of communication, interpersonal, presentation and facilitation skills were required by the learner group?

Click to complete Activity 13

4D Demonstrate effective facilitation skills

It is generally accepted that adult learners are responsible for their own learning. As a trainer, your role is to support learners to achieve stated learning outcomes and to lead the group, supporting the learning of individuals and keeping everyone moving in the desired direction. Your role therefore requires you to have good facilitation skills and the ability to manage, lead and motivate the group of learners.

However, not all learners will come to your sessions ready and willing to learn. Among the challenges you will face as a trainer or facilitator is how to create an interest in learning and to motivate people who may have a negative response to learning.

Effective facilitation

Facilitation is a way of helping people reach a goal or learning outcome by leading them rather than teaching them. Facilitation is learner-centred; it lends itself well to adult learning because of the adult learner preference to be self-directed and guided rather than told. Training, by contrast, tends to be trainer-centred. In a sense, a trainer imparts knowledge or teaches skills, whereas a facilitator leads learners to develop skills and knowledge for themselves.

Effective facilitation calls upon the following range of communication, interpersonal and group management skills.

Motivating

- This involves motivating learners; helping them to think critically and develop their own skills and knowledge; making links between their experience and new knowledge; and asking open questions and fostering discussion is a common way of achieving this.

Managing interaction

- This involves managing group interaction to maintain group cohesion and foster positive interactions, ensuring all learners have an opportunity to contribute and participate in the learning process.

Utilising diversity

- This involves utilising the diversity of the group to enrich the learning outcomes.

Guiding/intervening

- You may need to intervene when focus has moved away from the required outcome, when one learner is dominating a group, or if conflict is emerging between learners.

Clarifying and synthesising

- This involves supporting learning by helping them to synthesise information and ideas, and clarifying information, procedures and concepts when necessary.

Providing resources

- Provide resources and aids that engage learners and support different learning styles.

Monitor and reassess

Effective facilitation contributes to group processes in a way that motivates learners and creates an environment where group members trust each other and are empowered to make learning decisions. One of the most important skills you can develop is the ability to observe and monitor group processes 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 strategy, style and methods to suit group and individual needs.

As you get to know your learners, you may identify one or more participants who don't particularly want to be part of the session. Some learners participate actively and some learners are 'there for the ride'; they may do the minimum work possible, often allowing others in the group to do most of the work. Sometimes a person is instructed by their employer to attend the training session. Others may be find the session content difficult or challenging, and may be at risk of dropping out.

Strategies for motivating learners

There are a number of strategies you might try to help motivate learners. What works for one learner may not work for another. In some circumstances it is at this point where a knowledge of different learning theories and learner preferences can be helpful. In other situations where you encounter someone who simply resists learning altogether, no strategy will be effective. However, you may find the ARCS model useful to help you motivate learners.

Attention

To gain and maintain attention:

- use humour where appropriate
- tell a relevant story – don't finish it all at once, but stagger it and add to it throughout the session as opportunity arises; or perhaps at the beginning of the session, before lunch and at the end of the session
- use props to make the room or session more interesting.

Relevance
This should answer the question, 'What's in it for me?' If learners can't see the relevance of the session to them, they are unlikely to participate fully in it. Apply the Knowles theory: find out why your learners are there and try to relate the session to that.
Confidence
Use positive feedback to encourage learners and build their confidence; look for genuine opportunities to praise and offer positive reinforcement.
Satisfaction
Provide learners with opportunities to use or demonstrate what they have learnt; for example: ▶ Ask competent learners to buddy up with other learners to help them with particular tasks; try to ensure everyone gets a chance to take this lead role. ▶ Summarise and reinforce learner achievements throughout each session; don't wait until the end of the session to do this.

Create a positive learning environment

Although you will want to create a safe, trusting and pleasant learning environment, be aware that a model or plan may not work for all learners all the time. Learner characteristics can play a significant role in how they participate and learn – or don't learn. In any learning environment, but particularly a group learning environment, learners are vulnerable in that their knowledge/skills/ability to learn are on show.

Learners may:

- feel vulnerable
- be afraid of being laughed at (for example, if they give the wrong answer or can't complete an activity), possibly due to negative feelings about prior learning experiences or a fear of having inadequacies exposed
- be afraid of not knowing the 'rules', particularly if they are from a different cultural background
- be unfamiliar with learning and/or have not attended a learning program in Australia.

How learners react to the learning environment

There are three significant influences on how learners react to their learning environment:

- their memories or previous experience of learning and education
- their LLN skills
- their cultural background.

Past experience
Learners will come with pre-existing ideas of what training is like and what you, the trainer, will be like. This will be based on their experiences, which may have been good or bad. The reality of adult learning is that there are many learners for whom a negative past experience of learning is a significant barrier. For this reason, it is important that learners view you as a partner who will support and guide them in their learning, but that they are responsible for their own learning.
Language, literacy and numeracy (LLN)
Learners who experience difficulty with LLN may feel vulnerable, inadequate and embarrassed to speak out or participate. Ensure that any LLN issues are identified and appropriate support is arranged. Promote and encourage a supportive learning environment by ensuring there are multiple learning experiences so that all learners have an opportunity to participate in an appropriate way.
Cultural differences
Cultural differences can have either a positive or negative impact on the learning environment. Negative effects may be the result of inadequate or inappropriate strategies for including cultural considerations. Where cultural behaviours are causing concern, you must address these. Deal positively and decisively with issues as they arise and follow your organisation's policies and procedures at all times.

Evaluate learners' progress

As you and the learners progress through your session/s, you should evaluate learner progress (formative assessment) and adjust the delivery session to address learner needs.

Evaluating learner progress is generally an ongoing process. It can be achieved by using different methods. Here are some examples.

Methods and strategies for evaluating learner progress:

- Ask questions.
- Listening to group discussions; for example, determine whether conversations reveal the required level of understanding.
- Observe the learner's work or activity outcomes; for example, ensure the learner has completed a workbook activity.
- Use formal assessment procedures, such as assessment tasks, work products and role-plays.

Modify sessions if necessary

If you note that learners are not progressing as expected or that an activity is not achieving its intended results, you may need to modify the session; you may even need to modify an activity mid-stream. For example, if you observe learners having problems completing a computer-based activity, you may wish to stop the class and demonstrate to them how to complete the activity before they continue attempting the task.

Remember, learners can provide immediate feedback about whether the session is meeting their needs. Reviewing learner progress during and at the end of each session allows you to make appropriate adjustments to delivery. Engaging learners in conversation about what they are doing and how they feel about the learning will tell how effective the session is and how well it is engaging learners. You should also remain observant for signs that learners are becoming uninterested or otherwise disengaged, find out why, then adjust your delivery.

Facilitation is a skill that improves with experience. During breaks or after each session, take the time to reflect on the session to determine the effectiveness of the techniques you have used and to think about alternative techniques you might use to improve outcomes.

Example

Demonstrate effective facilitation skills

As part of his learning strategy, Carl asks learners to work in teams to discuss a case study, find solutions to the given situation, then present their findings to the team.

Carl facilitates the activity by asking everyone to individually read the case study so they have time to consider the scenario before discussing the case in their group. While the learners are reading the case study, Carl studies the group, looking for signs of any learners who seem uncomfortable with the activity. The case study is important to the training and is being used as a formative assessment task to confirm that learners are able to apply some key concepts covered in the session.

Carl adjusts his initial plans for the activity by asking groups to identify the key points from the case study. These are confirmed before the groups discuss the case study in depth. He changes the requirement that each team member present a summary of one point, and instead asks the team to nominate one person to report to the larger group.

During the group discussions, Carl joins each group to listen to the discussion and ask questions that challenge learners' thinking. He also makes statements and seeks opinions from quieter group members.

Activity 14

1. 'Social loafing' is a term used to describe how some individuals don't participate as well when working in a group as they would when they work on their own, by allowing others in the group to do most of the work.

   Describe two different scenarios where you have seen this situation. Outline the strategies the facilitator used to ensure that each group member was fully participating and detail the effectiveness of the strategies.

2. Describe the possible impact of social loafing on learning outcomes.

3. What kind of facilitation skills/techniques would you use in a situation where you are upskilling experienced process workers in communication and interpersonal skills? What communication, interpersonal, observational and group management skills would you consider to be appropriate?

Click to complete Activity 14

Summary

1. Facilitation is the process of guiding learners to use their skills and knowledge to achieve a goal or outcome. A skilled facilitator uses communication, listening and questioning skills to help learners achieve desired learning outcomes.
2. Adult learners bring with them a great deal of knowledge and experience. Group diversity is a rich resource that facilitators should use to ensure learning is meaningful and relevant to learners.
3. Use a range of delivery methods to offer a learning experience that motivates and engages learners, providing each individual with the opportunity for participation. Delivery methods should be adapted to address individual learning styles and preferences.
4. While the session plan is a blueprint for delivery, be ready to respond to triggers that alert you to the need to modify a session plan.
5. Contingency plans should be made to address any unforeseen circumstances that occur when using resources/aids.

Topic 5

In this topic you will learn how to:

Support and monitor learning

In some situations you may find that learners are not progressing as well as they should be. To have a clear idea of the effectiveness of your session and to identify any new, emerging or additional learner needs, you should use different strategies to determine learner progress, and adjust the delivery where necessary to support learners' needs. Monitoring sessions and learner progress also allows you to identify and/or address behaviour that inhibits learning.

Monitoring and documenting learner progress means you will need to determine your recording-keeping obligations. There will be organisational requirements to meet and procedures to follow; records can relate to formative assessment, summative assessment and funding body reporting requirements, so you must ensure that you are following the correct processes and procedures.

Clause 1.7 of the Standards for Registered Training Organisations (RTOs) 2015 requires an RTO to identify support needs (for example, by requiring learners to complete a self-assessment as part of the enrolment process).Where additional support requirements have been established, the RTO must be able to demonstrate that this support has been made available. Clause 1.2 requires an RTO to have taken into account each learner's existing skills and the possible modes of delivery when determining the amount of training. The RTO needs to ensure this is appropriate and make adjustments for the learner as required.

5A Monitor and document learner progress

Many stakeholders have an interest in the learner's progress. The type and purpose of the interest may be different, but each stakeholder will rely on you to provide accurate, up-to-date information. You will therefore need to understand what information is required, the reason for it and when it is required. You will also need to determine what process you will use to monitor progress.

In some instances, this documentation will be required for organisational purposes. Often, however, you will need to maintain progress records so you are aware of how well learners are performing against program benchmarks and how well their learning needs are being met. Also, don't overlook external drivers (such as the VQF/AQTF, funding body requirements or employer needs) as a reason for monitoring and documenting learner progress.

Monitor learner progress

There are different methods of monitoring learner progress; this will depend on your organisation's procedures and requirements. Among the most fundamental monitoring methods are:

- observing a learner's performance against the desired outcomes or other performance measures
- directly interacting with the learner to discuss their needs and how well these needs are being met.

Cater to stakeholder requirements

You need to be mindful of who else may require information about learner progress beyond you and the learner. The people who may be interested in a learner's progress can vary depending on the nature of the learning program, the desired outcome/s, quality requirements and funding sources. The following table provides some examples of parties that may have an interest in learner progress and why.

Trainer or facilitator

- Reasons for interest may include:
  - checking that the learner is developing the required skills and knowledge
  - checking that the learner isn't falling behind
  - confirming that all required assessment/practice activities are completed
  - to have the information needed to be able to discuss progress with the learner, their workplace supervisor, case manager or other interested parties
  - to be able to identify and offer support as needed
  - determining if training should be adjusted to address specific needs
  - to be able to meet internal and/or external reporting requirements
  - providing input into program evaluation to determine whether you should consider changing aspects of the learning program.

The learner's employer/workplace supervisor

- The employer may be interested in learner progress as an indication of the suitability or effectiveness of the training or whether the employer should persist with sponsored training.
- Employers or supervisors might want to know of any need to provide additional learner support.
- Progress reporting can be important to an employer of trainees in funded schemes; for example, to confirm incentive payments.

Your organisation (if it is an RTO)

- Reasons for interest may include to:
  - meet VQF/AQTF compliance requirements
  - comply with funding agreements based on learner progress
  - confirm enrolment for contractual reasons.

The learner

- The learner will be interested in how they are progressing.

Government/state training authority/ funding body

- Where the learner/organisation receives funding related to the training, the government or funding agency may require reports on learner progress, completions, attendances, etc.

Indicators of progress

To ensure that program or session learning outcomes are achieved, you must monitor the progress that learners are making – this means finding evidence that confirms the learners are progressing through the learning as planned. You'll need to be clear about what you're looking for: what the performance measures are and how you know that the desired outcomes have been achieved. The learning program you are working with should provide you with the guidance and measures you need to be able to monitor learner progress effectively. Formative assessment allows you to monitor progress, confirm whether performance benchmarks have been achieved and form an objective view of the learner's progress. Examine the following to monitor and document learner progress.

Measure progress by considering:

- the activities completed by the learner
- the performance criteria in which the learner has demonstrated competency
- the elements or units of competency for which the learner has completed learning activities
- the sessions the learner has attended
- assessment or progress against standard operating procedures or workplace benchmarks.

Sources of information

Quantifiable data, assessment requirements and informal impressions of a learner's performance, concerns and circumstances can also assist you to know whether they are achieving the intended outcomes.

Sources of information that can assist your monitoring can include:

- the record of progress on a learner training plan
- an attendance register
- a matrix showing a list of all learning activities and the date when the learner completed them
- your questioning and observation skills
- evaluation and revision tasks
- feedback from learners and other stakeholders.

Feedback from learners and other stakeholders

Seek feedback from learners and other stakeholders at regular intervals during the learning program to ensure expectations are being met. This can be done by using feedback or evaluation forms. Many organisations have prescribed forms/templates for you to use to record learner progress. These may be paper-based or electronic.

Generally, 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 to confirm your observations.

You will need to refer to your organisation's policies and procedures to determine any progress reporting requirements, including how it is to be done and how often.

Monitor the learning environment

Although you will have prepared and checked the learning environment prior to your first session, you may find that monitoring the learning environment allows you to identify and rectify any concerns, or make changes to ensure the learning experience remains a positive and effective one. It also provides you with the opportunity to reflect on how the learning environment may be improved to support or improve learner outcomes.

Monitor the learning program

If the learning program consists of more than the one session, monitor the ongoing suitability of the program for the learners. This applies equally to learning for people enrolled in an RTO course and to workplace-based learners.

Remember, monitoring progress from the perspectives of all interested parties is one of your key functions as a trainer. Monitoring can take many forms.

Confirm that the content you are delivering and the way learning is occurring is appropriate to the learners and meets organisational requirements. Refer to program learning outcomes/objectives to determine how well these are being met.

Example

Monitor and document learner progress

Stephen is delivering a two-day 'Introduction to computers' course. He has prepared a structured session outline in which he plans to introduce Microsoft Word, followed by Excel, then PowerPoint. It is important that learners are comfortable with Word as Stephen is aiming to introduce Excel by pointing out the similarities between the two programs, progressing from the known to the unknown.

At the beginning of the session, Stephen records attendance, explains the WHS policy to the learners and establishes the level of existing knowledge among group members.

Once learning starts, Stephen demonstrates some Word functionality, then asks the learners to complete two simple activities that require them to use this functionality. The exercises Stephen is using are cumulative, each building on preceding learning stages, and learners are monitored to ensure they are able to complete each stage.

Stephen observes each person to ensure they are able to complete the activities. At different points learners will complete a short evaluation activity so they have the chance to consolidate their learning and demonstrate their competence in each task.

When Stephen is comfortable that each learner can demonstrate mastery of a task, he moves them on to the next learning point.

Activity 15

1. Discuss with your trainer how they are monitoring your progress. Document the strategies and methods they have identified to monitor and measure progress.

2. Detail how your trainer will identify if learners are not meeting desired outcomes, or if their individual or organisational needs are not being met.

Click to complete Activity 15

5B Adjust delivery sessions to reflect specific needs and circumstances

Effective monitoring activities should lead you to reflect on how you may need to adjust the delivery sessions based on:

- the needs of learners
- the learning program
- the organisation
- environmental factors.

The reasons for making adjustments may vary from group to group. What is important is that you are able to recognise when to make an adjustment and what you need to do to meet a learner need or other circumstance. Observation and interaction with your group will reveal what is required and what you need to do.

Experience is always a good guide, but be aware that there may be organisational policies, procedures or protocols for dealing with some circumstances.

Adjust delivery to meet learner needs

In addition to any organisational or compliance requirements, a key motivation for monitoring learner progress is to track learner progress against learning outcomes. This will allow you to adjust your delivery strategy, methods and style to help learners achieve the desired outcomes.

Adjustments often relate to reassessing your delivery style based on your interactions with the learners. The delivery style you use should be responsive to learner needs; so, depending on contingencies that arise, you may need to reassess your strategy. It is possible that a learner will recognise they are already competent in many of the areas and may seek an alternative training pathway. Consider some of the examples that illustrate this in the following table.

Learner need/ circumstance	Potential adjustment
Learners are not responding to your questions – you suspect that they may be fearful of sounding stupid if they don't respond correctly.	▶ Change your questioning style; for example, ask the question, then get learners to discuss responses in pairs. This enables learners to talk through and confirm their responses before providing you with an answer. ▶ Run an activity, such as an icebreaker, that gets learners interacting and building trust with you and each other. ▶ Use a quiz or game to check understanding to avoid any cultural concerns in relation to questioning learners.
You sense that there is frustration in the group caused by mixed abilities.	▶ Provide 'stretch' activities to challenge advanced learners. ▶ Run mini-review sessions for less advanced learners. ▶ Ask advanced learners to demonstrate concepts to other learners on a one-on-one basis.
Learners appear flat and unmotivated after lunch.	▶ Provide an energiser activity that gets learners moving and stimulated. ▶ Run a quiz or other review activity in a group format. ▶ Conduct a physical activity that can energise learners.
Learners have completed learning activities ahead of time.	▶ Provide extension activities to challenge learners.
One or more learners are unable to attend the full session.	▶ Provide the learner/s with notes and activities that can be done in their own time. ▶ Provide additional support.
You realise that some learners are not participating in group activities.	▶ Assign roles and responsibilities to group members. ▶ Create teams with rotating responsibilities.
Learners resist the training session as they have been told they must attend, but not why they should.	▶ Discuss learning outcomes and relevance to learners or run a suitable clarification activity to highlight personal and organisational benefits. ▶ Discuss portability of skills.

Other signs that learner needs are not being met

Changing behaviour may be a sign that learner needs are not being met. Inappropriate or distracting behaviour, inattention, poor concentration or lack of engagement can all be symptoms of learning difficulties or language, literacy and numeracy (LLN) problems. Often, observation over a period of time can point to this. If there are signs of possible learning difficulties, you should take steps to confirm the underlying cause of the behaviour. You can do this by seeking specialist support in your organisation or by consulting with your supervisor or manager.

Other reasons for adjusting delivery

There may be other organisational or environmental reasons that require an adjustment to your delivery style or strategy. Unanticipated problems can occur at any time and sometimes even the best planning won't cover every contingency or the need for you to make swift decisions.

For example, technology and equipment failures are common and a workplace crisis can mean that learners are required to return to their job. In these circumstances, you may need to adjust content, delivery methods or session times so that learning can continue. Your RTO may allow continuous enrolment in a course, necessitating continuous adjustment for fluctuating numbers of learners. Many situations that occur in a session or learning program may generate the need to adjust a session.

Further evaluation and revision techniques

Continuous evaluation and revision can be used to improve session plans. It may take place:

- during training sessions
- incidentally
- as a result of your efforts outside training sessions
- as a result of the organisation's processes.

Examples of these evaluation and revision techniques include:

- discussion and validation sessions with colleagues
- formative assessments, which indicate the learner's progress and the effectiveness of delivery
- participating in continuous improvement and planning processes
- collecting, analysing and organising information
- researching alternative facilitation and training delivery techniques
- observing experienced training practitioners and their methods for face-to-face delivery.

Example

Adjust delivery sessions to reflect specific needs and circumstances

Mariana is delivering a training session that has been designed to help learners increase their skills and knowledge in relation to customer service.

Several activities use written case studies requiring learners to read about situations where poor customer service results in a customer complaint, then to consider the issues presented and suggest alternative ways to deal with the situation. In groups, learners discuss their ideas and present two possible solutions to the larger group.

At the beginning of the session, Mariana notices that the group includes learners who may have difficulty reading and understanding the case studies due to language barriers. She adjusts the activity by:

- explaining the key issues
- facilitating a whole group activity where learners provide suggestions for alternative solutions
- asking the learners to break into smaller groups to discuss which solution they feel would be most suitable.

Mariana ensures that each sub-group is made up of learners who have a range of language skills. At the end of the discussion, she asks each group to nominate their preferred solution and explain the reasons for their selection.

Activity 16

1. Describe a scenario you have been involved in or know about in which a trainer has had to make adjustments during a training session.

2. Outline the reason for making the adjustment.

3. Explain how the session was planned to proceed and how it actually proceeded after the adjustment. How would you have handled this situation?

Click to complete Activity 16

5C Manage inappropriate behaviour

Different expectations, backgrounds, cultures, prior experiences and other individual differences can sometimes lead learners to exhibit inappropriate behaviour. You should be able to quickly identify these behaviours and apply appropriate strategies to:

- minimise the impact of the behaviour
- deal with the reason/s for the behaviour
- eliminate the behaviour or remove its cause.

Often, gathering background information about learners through introductory and ice-breaker activities will provide you with clues about any potential behavioural issues that may arise. However, you must be careful not to prejudge anyone; it is best to carefully monitor how your learners are performing and interacting with each other and be alert for any emerging problems.

What is inappropriate behaviour?

Inappropriate behaviour includes verbal and nonverbal behaviour, physical behaviour or actions.

Any behaviour or action that breaches WHS policy or procedure, contravenes organisational policy or procedure or is in breach of Commonwealth, state or territory legislation is inappropriate and should be dealt with immediately and decisively.

Inappropriate behaviour does not typically threaten the safety of others; however, the following behaviours are concerning inappropriate behaviours.

Inappropriate behaviours include:

- threatening the safety of a person or damaging equipment
- disrespectful actions, comments or discriminatory behaviour, bullying and harassment
- behaviour that negatively affects the successful achievement of learning outcomes
- violent or inappropriate language
- verbal or physical abuse or bullying
- insensitive verbal or physical behaviour towards other learners or the trainer/facilitator, including cultural, racial, disability or gender-based insensitivities
- dominant or overbearing behaviour
- disruptive behaviour
- noncompliance with safety instructions.

Causes of inappropriate behaviour

Learners may exhibit inappropriate behaviour for many reasons. A challenge facing every trainer/facilitator is being able to recognise the causes of inappropriate behaviour and respond before the behaviour manifests itself or becomes a problem. Often, it is only as the behaviour starts to emerge that you begin to see the first signs of a potential problem.

Be mindful that you have a duty of care towards your learners. Ensure you are aware of and monitor learners in the training session for inappropriate behaviour. If inappropriate behaviour occurs or is reported to you, you must take appropriate action.

The following are possible causes of inappropriate behaviour:

- drug or alcohol problems
- lack of self-confidence
- LLN problems or a learning difficulty
- not attending training voluntarily or a prior negative experience of training
- conflict with other participants
- illness, stress or mental health problems
- cultural or religious differences
- events occurring in a person's private life.

Legislation relevant to inappropriate behaviour

All workplaces and training organisations have policies and procedures designed to deal with inappropriate behaviour. Policies, procedures, codes of practice, workplace standards and relevant legislation may vary by organisation and state. However, they commonly cover work health and safety (WHS), privacy, discrimination and equal opportunity.

You must understand and abide by the requirements of relevant organisational policies, procedures and codes of practice as these address and reflect key legislation, and provide the mechanism for dealing with behavioural issues. Ensure that you follow correct procedures and deal effectively with inappropriate behaviour to meet your legal and ethical obligations as a trainer.

Key applicable legal requirements are:

- The *Work Health and Safety Act 2011* and the Victorian and Western Australian health and safety acts (*Occupational Health and Safety Act 2004* (Vic.) and *Occupational Safety and Health Act 1984* (WA))
- various codes of practice/codes of conduct
- state and territory equal opportunity Acts
- *Disability Discrimination Act 1992* (Cth)
- *Racial Discrimination Act 1975* (Cth)
- *Sex Discrimination Act 1984* (Cth)
- *Privacy Act 1988* (Cth)
- *Australian Human Rights Commission Act 1986* (Cth)

Inappropriate behaviour management

Because behaviour is so individual, there are no 'rules' for managing behaviour. When training or facilitating many groups, the issue of behaviour does not always need to be addressed. Focusing on behaviour in some groups could be felt as patronising. However, all groups need to be informed of the organisation's procedure for dealing with complaints.

With other groups, learning outcomes would be affected if expectations of behaviour are not addressed early. Behaviour management tends to be more of an issue if a learner has not elected to enrol in a course, but is required to. Some of the techniques you can use, if necessary, are outlined in the following table.

Technique	Explanation
Establish rules	Establish 'session rules' and ask learners to outline the rules they believe the group should abide by.
Inform learners of legal obligations	When reviewing the list, ensure that any legal obligations related to WHS, discrimination and bullying are covered.
Preparation for the workforce	Explain to learners that they are being prepared for what they will encounter in the workplace context and that some behaviours will not be tolerated in the workplace.
Complaints process	Ensure that everyone understands the complaints process.
Intervention strategies	Identify and apply suitable intervention strategies where appropriate.
Role modelling	Role model appropriate behaviour.
Adjust session delivery	Adjust session delivery to address the cause of the behaviour; for example, alter communication and/or language style, use positive feedback or adjust learning activities.
Acknowledge culture	Acknowledge and deal with any cultural issues; for example, the content may be inappropriate to a person's culture or religion, or they may not understand what is acceptable in Australia.
Identify an individual's difficulty	Identify if the learner is bored, having trouble understanding the content or is struggling to keep up with the work.
Seek assistance	If all else fails, seek the assistance of your supervisor and/or have the person removed – remember, you have an obligation to other learners to provide a safe, positive learning experience.

Conflict resolution

At some point in a training session, conflict may arise. This conflict could be between learners, or between you and a learner. You should familiarise yourself with conflict resolution techniques so you have the capacity to defuse or minimise any conflict before it undermines the session and future learning, and certainly before it causes or threatens to cause harm to other learners or yourself.

Conflict can arise when learners are involved in a situation they perceive they have no control over or are unable to accept. Circumstances such as differences in values, religion, culture, work activities or the expectations of others can lead to conflict.

Clear, agreed ground rules for behaviour in a learning group can help to minimise the risk of conflict developing.

Ground rules can include:

- Show respect for each other.
- Value differences, including different backgrounds/cultures/abilities/opinions.
- Leave unrelated personal or work-related issues outside the training room.
- Abuse of any sort – verbal, physical or implied – will not be tolerated.
- Everyone must be punctual for all sessions and when returning from breaks.
- Everyone should participate to the best of their ability.

Establish agreement on strategies

Some training sessions are scheduled at times that learners find difficult; for example, part of the training may be scheduled when their children start or finish school. If the organisation cannot be flexible about training times, ground rules should be laid to prevent disruption to other people's learning. You may tell learners that anyone who has been necessarily delayed should enter the room quietly and catch up on missed work in their own time. Remember, session plans can be modified to meet learner needs while still meeting organisational requirements; for example, activities that can be completed independently could be moved to the beginning of the session.

In order to create a safe and harmonious learning environment for a group where there is a risk of inappropriate behaviour, it can also be useful to agree on a strategy for how they can raise a concern/issue that they have with you or another learner. This strategy should also be agreed at the beginning of the session. Here is an example.

Behaviour	Action	Resolution
▶ A learner habitually interrupts others when they are talking.	▶ Anyone who is upset by this behaviour needs to note the behaviour on a yellow sticky note and place it on the 'Issues' flip chart.	▶ At the end of each session the trainer collates this feedback. ▶ At the beginning of the next session, the trainer facilitates a discussion on group concerns and relates these back to the established ground rules. ▶ All learners need to reconfirm that they will adhere to the ground rules.
▶ A learner frequently speaks off-topic when learners are engaged in group activities.		

Respond to a negative situation

How you react to a learner's behaviour can result in a change in their behaviour for better or worse. Here are examples of how you might choose to react to a negative situation during a learning session so as to not exacerbate the behaviour.

Suggestions for managing learner behaviour		
Behaviour	**What to do**	**What not to do**
A learner has been staring out the window for most of the session.	▶ Engage the learner without drawing attention to them or their behaviour. Ask them what they think about what you are saying or how what you are saying applies to them.	▶ Don't draw attention to the behaviour unless it is disrupting the session and/or other learners.
A learner seems to be deliberately trying to take the discussions off-course.	▶ Ask the learner to provide an example of how what they are saying can be applied to the session content. ▶ Find out later if there are issues they want to discuss.	▶ Do not openly confront the learner or tell them that their response is irrelevant.
A learner is not participating in an activity.	▶ Change your delivery strategy/learning activity to encourage learner participation; for example, include a task where learners need to produce something within a time limit. ▶ Talk to them privately later about any concerns or barriers they may have.	▶ Don't confront the learner in public by asking, 'What's wrong?' or 'Is everything okay?' as this draws attention to the learner.
A number of groups of learners are speaking among themselves	▶ Examine the reasons why this is occurring and be prepared to review your delivery or content. ▶ Refer learners to ground rules about the right to learn. ▶ Re-focus learning. Try changing your delivery strategy/learning activity. Mix the groups up and get them to present results of the activity to the rest of the class. ▶ Give the learners a quick 10-minute break and establish whether there is a problem or what you need to do to re-focus learning.	▶ Don't treat the learners like they're at school by asking them to pay attention – this may alienate them.
A learner is constantly late for sessions or is late returning from session breaks	▶ Start each session with a quiz to review the previous session – make it a fun one so that the learner wants to be there. ▶ Discuss the matter privately with the learner – reconfirm your expectations and ground rules.	▶ Don't put barriers in the way of their learning. ▶ Don't set up a conflict situation.

Suggestions for managing learner behaviour		
Behaviour	**What to do**	**What not to do**
A learner becomes violent or abusive	▶ Ensure the safety of all learners and yourself. Follow organisation policy and procedure for dealing with incidents of this type. ▶ Involve and inform your immediate manager ▶ If necessary, quietly ask the learner to leave the room so they have time to calm down. Let them know they are welcome to return when they are ready to continue participating in the session. ▶ Make arrangements to meet with the learner after the session to try to understand their concerns and how these may be addressed. Emphasise that violent or abusive behaviour has no place in a learning environment. ▶ Seek the support of your manager or student counsellor.	▶ Don't accept or ignore the behaviour. ▶ Don't argue with the person. ▶ Don't embarrass the person or aggravate the behaviour.

Example

Manage inappropriate behaviour

Margot notices that some learners in her customer service training session are not discussing the role-play she has asked them to prepare. Instead, they are whispering to each other and are obviously unhappy about something. These learners arrived late for the session and seemed unhappy from the start.

Before the morning tea break, Margot asks everyone to make sure they come back on time as there is a lot of work the group needs to get through. Despite this, the same group of learners arrive 10 minutes late, which means that Margot has to repeat information and instructions. Margot is experienced enough to observe that, while not directly disrupting the session, this small group is clearly acting in a way that is undermining the overall harmony of the training. Their resistance to the training is diminishing the effectiveness of the learning program for other learners.

After making contact with this group and probing the reasons for their behaviour, Margot learns that its members are team leaders who feel they have been placed in the wrong group.

To address this issue, Margot adjusts her afternoon session plan so that each team leader leads a smaller group to complete some of the activities. By splitting up the team leaders and asking them to take on a leadership role in the session, the team leaders feel that their seniority and experience is recognised, and they respond by becoming active participants in the session.

Activity 17

Provide three examples of inappropriate behaviour you have observed or are aware of. You may wish to discuss with an experienced trainer examples from their practice.

For each example, identify:

- Its causes or likely causes, including whether the behaviour was an outcome of unmet needs, learner difficulties or inappropriate facilitation skills.
- How the trainer responded to the behaviour; discuss any conflict resolution skills used and the effectiveness of interpersonal and communication skills.
- Any alternative responses from the trainer you believe would have been appropriate, and why.

Your response should include a discussion of how adult learning principles, learning styles, delivery methods and strategies could be applied to deal with the behaviour.

Click to complete Activity 17

5D Maintain and store learner records as required

The type of information that you may have about your learners or may need to maintain includes:

Attendance records

- Attendance register/s confirming learner personal information, enrolment and attendance details.

Assessment records

- Records of assessments undertaken and/or activities completed by learners.

Employment records

- Information regarding the learner's current employment, and the name and contact details of their workplace supervisor (if the learner is undertaking training as part of a traineeship).

Feedback

- Feedback/evaluation forms from your learners and/or their workplace supervisors in relation to learning outcomes, course content and general satisfaction with the learning program.

Organisation-specific information

- 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.

Purpose of organisational record-management systems and reporting requirements

Organisational record-management systems and reporting requirements are intended to ensure the following.

Purpose of record-keeping and reporting requirements:

- All learner information is accurate and current.
- All details about how the training was delivered and the tools that were used met quality standards.
- Learner progress is measured and monitored, and results recorded.
- Legislative and funding obligations have been met and complied with.
- The correct processes and procedures were followed.
- The student receives a detailed record and evidence of their learning achievements.
- Learner feedback and evaluation is recorded and can be used for continuous improvement.

Legislative, funding body and organisational requirements

How you maintain, report and store information on legislative, funding body and organisational requirements will depend on:

- your organisation's policies and procedures
- legislative requirements.

If your organisation is an RTO, there will be VQF/AQTF and/or Education Services for Overseas Students (ESOS) requirements. This may include records of attendance in case they may be in breach of their Visa conditions if they do not attend their course.

If your organisation receives government funding to deliver training, the funding agreement may contain specific requirements relating to recording, reporting, maintaining and storing information.

Your organisation will have its own policies and procedures in relation to maintaining and storing learner records. At a minimum, organisational policies and procedures should meet legislative requirements in relation to privacy/confidentiality, but RTOs must also meet VQF/AQTF and/or ESOS requirements.

An RTO must retain results for a period of 30 years so that records of qualifications and statements of attainment can be reissued if necessary. For example, assessment records must be retained for a minimum of six months, and up to two years for some funding bodies.

Privacy and confidentiality

Privacy and confidentiality are significant concerns for all organisations dealing with personal information. Privacy refers to a person's ability to control another person or company's access to themselves, their space and their possessions, including information about themselves. Privacy also means taking steps to avoid embarrassment and humiliation.

Confidentiality is about data or information only (not a person's physical body or possessions). It refers to managing access to private information. Confidentiality refers to both written and verbal information.

Confidentiality provisions restrict an individual or organisation from using or disclosing information about a person that is outside the scope for which the information was collected.

Confidentiality includes 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.

Legislation applying to privacy and confidentiality

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

There are 14 Australian Privacy Principles that apply to the private and not-for-profit sectors, and are requirements when recording or reporting sensitive information under the Privacy Act.

Further details about privacy can be found on the Office of the Australian Information Commissioner website:

- www.oaic.gov.au

VQF/AQTF requirements

The Standards for NVR Registered Training Organisations 2012 and the AQTF impose an obligation on RTOs to ensure that records are systematically collected, recorded and stored, and that learners have timely access to current and accurate records of their participation and progress.

RTOs registered to deliver training to international students must also comply with the legislation requirements relating to education services to overseas students.

Privacy, confidentiality and the accurate capturing, recording and proper storage of information are central to complying with requirements for maintaining learner records.

While some of these obligations rest with the management of the RTO, much of it relies on you ensuring that the rights of learners are upheld.

Maintain these record-keeping standards:

- Meet privacy and confidentiality requirements.
- Ensure records are accurate.
- Ensure that inaccurate records are updated.
- Support your learners to access their records, should they wish to.
- Comply with your organisation's policies and procedures.

Example

Maintain and store learner records as required

Glenn is asked to deliver a learning program consisting of three two-hour sessions to a group of mature-age learners recently arrived in Australia. The program is designed to assist people using computers to support job seeking and improve their English language skills.

Glenn's employer is an RTO that has a learning management system enabling trainers to access and maintain their own learner group records online via a secure password. Prior to his first session, Glenn checks the group's records from his computer in the staffroom to learn more about the people. While he is viewing the enrolment records, a colleague asks Glenn if he has a few minutes to discuss a meeting they are both required to attend. Glenn locks his computer screen so that learner records are no longer visible.

Once the discussion is over, Glenn returns to viewing the learner records.

Two of the learners are supported by case workers. Glenn knows there is an organisational requirement to make contact with the case workers prior to commencing the course. He decides to print out the records of those two learners.

The printer is some distance away from his desk, so Glenn prints the records using the security printing function on his computer – this means the records will not physically print until he reaches the printer and inputs his access code. Once he has made contact with the case workers, Glenn destroys the printouts by shredding them.

Activity 18

1. Collect your organisation's policy and procedures relating to:
   - recording results
   - privacy and confidentiality
   - storing records.

   For each document, briefly explain the requirements it places on you as a trainer.

2. Read the Standards for Registered Training Organisations (RTOs) 2015, then complete the following tasks:
   - Provide two examples of what you might need to do to comply with the requirements relating to maintaining and storing learner records.
   - What are the implications for you, your organisation and your employer if you do not comply with these obligations?

Click to complete Activity 18

Summary

1. A learner's progress may be of interest to a number of people, including the trainer, the learner, the person's employer and other parties that are funding the training.
2. Monitoring learner progress helps to identify any unmet needs or other requirements.
3. A trainer needs to be prepared to adjust delivery based on unexpected events or circumstances relating to the learner, the environment and the training plan.
4. Inappropriate behaviour can be the result of one or more factors. Trainers need to monitor learner behaviour and look for signs of inappropriate behaviour.
5. A trainer has a duty of care towards their learners and must know how to address any inappropriate behaviour. All workplaces and training organisations have policies and procedures designed to deal with inappropriate behaviour.
6. Every trainer needs to understand and comply with administrative requirements, policies and procedures relating to record-keeping/maintenance and storage.