



# Learner Guide

## **TAADEL404A Facilitate work-based learning**

Part of a suite of print-based support materials for the  
TAA04 Training and Assessment Training Package



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This Learner Guide is part of a suite of print-based materials supporting the TAA04 Training and Assessment Training Package including a range of Learner Guides, an Introduction to the Learner Guides and a Facilitator Guide. Copies of this resource and associated titles can be purchased from Innovation and Business Skills Australia.

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# Introduction

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How do you facilitate learning that happens in the workplace as part of normal work routines?

How do you plan and implement this type of learning activity where it is the work itself that is the means of learning?

How do you ensure that the purpose or objective of the learning is achieved?

This Learner Guide supports *TAADEL404A Facilitate work-based learning*, a core unit in the *TAA40104 Certificate IV in Training and Assessment*.

Learning through work is ongoing and is part of the everyday reality of being in work. However, the effectiveness of that learning can be improved by interventions that modify, direct and provide support to the workplace learner. This guided learning ensures a planned approach to learning through work activities, effective support of the learning and appropriate monitoring and safeguards.

This unit addresses the processes, skills and knowledge involved in using the work process and the work environment as a basis for learning.

More specifically, this unit will help you develop knowledge and skills to enable you to:

- establish an effective working environment for learning
- develop and implement a work-based learning pathway
- monitor learning and address barriers to effective participation
- review the effectiveness of the work-based learning pathway.

## Before you begin

To help you work through this guide, make sure you read the:

- *Introduction to the Learner Guides*. This separate resource outlines general information for learners.
- unit of competency *TAADEL404A Facilitate work-based learning*  
In particular, read the 'Application of the unit' statement at the beginning of the unit.

## Context

To complete this unit you need to identify a training and assessment environment where you can access information and apply the skills that you are developing. This setting is called the *practice environment* throughout this resource.

## Pathways

This Learner Guide is designed to be contextualised, or adapted, to support learner needs. How you use it will depend on your background in training and assessment and the mode of delivery.

If you have experience in training and assessment, and in the area covered by this guide, you might negotiate the assessment activities with your facilitator and/or assessor without completing the Learning Topics.

If you have limited experience in the area covered by this guide, you should work through all or some of the Learning Topics and complete assessment activities.

Your facilitator will help you map out an appropriate learning pathway to suit your needs and negotiate evidence gathering for assessment.

## Icons

This guide uses a series of icons that will help you through the learning program:



This icon asks you to consider a matter. Your facilitator may ask you to:

- reflect on your own work—what you do now and how it can be extended or improved
- discuss a topic with a group
- discuss with a colleague or with your facilitator
- make notes for your resource kit.



This icon directs you to suggested resources to assist you, including:

- websites
- journals
- books
- people and groups
- policies and procedures.

Note that websites can change from time to time.

If you can't access a website, use a search engine. If you can access the website, but can't find a document in it, search for it using the website's search engine or sitemap.



This icon indicates an activity that can form part of evidence for assessment. You could also use these activities to get feedback from your facilitator about your progress.

## Compiling your own resources

As you work through this guide, compile a resource kit (electronic and/or paper-based) to add to, use for your work and assist with your learning. This could include, for example, information that you print out or 'bookmark' from websites, resources you download, newspaper articles about your industry and specific policies or procedures.

What you decide to put in your resource kit is up to you. Over time, it can become your resource companion containing information about current work practice and ideas.

The resource kit is for your own professional development and is different to any portfolio or file that you might keep for assessment purposes, although some resources may be included in both.

## Glossary

A glossary of terms is included in the *Introduction to the Learner Guides*. Use this glossary to clarify the meaning of any terms used in this Learner Guide.



# Assessment

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To demonstrate competence in this unit, you must be able to provide evidence that you meet the requirements of the unit of competency. This includes evidence that you have developed work-based learning pathways that integrate learning through work. It also includes identifying learning needs, analysing work projects and tasks, organising and allocating work in a way that reflects the learning needs, and providing effective learning opportunities.

Specifically, you must include evidence of a minimum of two examples of work-based learning pathways you have developed, demonstrating:

- identification of learning needs
- analysis of work practices, environment and tasks
- organising and allocating work in a way that reflects the learning needs
- provision of effective learning opportunities through work processes.

The evidence that you provide to show competency should be gathered in the workplace or, where no workplace is available, through a simulated workplace. The evidence must relate to a number of different performances assessed at different points in time and, in a learning and assessment pathway, these assessments should be separated by further learning and practice.

You might complete assessment activities specific to this unit only, or this unit can be assessed as part of an integrated assessment activity involving other relevant units in the *TAA04 Training and Assessment Training Package*. Suggested units include, but are not limited to:

- *TAADEL402 Facilitate group-based learning*
- *TAADES401A Use Training Packages to meet client needs*
- *TAADEL403A Facilitate individual learning*.

## Negotiating assessment

You and your assessor need to negotiate how you will show appropriate and sufficient evidence to demonstrate competence, reflecting the scope of the role as indicated in all components of this unit.

Completion of the suggested activities below will contribute towards your assessment. However, they are not necessarily the total assessment requirements for this unit of competency.

## Suggested assessment activities

Below are some suggestions for activities to be used as assessment evidence. You are encouraged to negotiate activities with your assessor, relevant to your practice environment or future work roles.

- Prepare a report or presentation detailing the ways you think learning through work differs from, or is similar to, that which occurs through classroom activities. Provide details of how you think workplaces best facilitate learning and what you think are the problems associated with learning through work.
- While you plan and organise your workplace learning, keep evidence of your work, including details of:
  - how you used your knowledge of learning principles to meet the needs, characteristics and styles of the learners
  - how you identified the purpose or objectives of the work-based learning and then explained them to your learners
  - how you analysed the work practices, routines and environment and suggested changes to these to support more effective learning
  - connections you made with other training/assessment organisations to integrate and monitor the external learning activities
  - any contractual requirements and responsibilities
  - how you catered for any equity or additional support needs of your learners
  - why you sequenced the learning activities in the way you did
  - the variety of communication mediums you used to establish rapport, and provide feedback, direction and advice to your learners
  - any procedures you established to manage your learners, monitor progress and provide support
  - how you encouraged self-directed and autonomous learning
  - how you assessed your learners and provided appropriate feedback in a timely fashion
  - your process for maintaining and storing learner records
  - the criteria used for reviewing and improving the work-based learning pathway process and/or work routines and practices.

One way you could organise, store and present your evidence is to use a portfolio approach. A portfolio is a collection of related items. Your portfolio should contain related items, or evidence, that shows you have planned and organised workplace learning pathways.

You could include the following items of evidence in your portfolio:

- Evidence that demonstrates your use of facilitation methods which address the needs of your learners and which enhance transferability of knowledge, skills and attributes and develop learner independence.
- A proposal to your colleagues and/or manager recommending the establishment of a particular work-based learning program. The proposal should include details of:
  - what work-based learning is
  - what a work-based learning pathway is
  - the benefits for the learner and the host organisation of undertaking a work-based learning program.
- Develop a list of criteria to use for deciding which strategies to use to support work-based learning. Describe details of where, why and how you applied these criteria.
- Create a report or presentation on what you have done to plan and facilitate work-based learning. The report should include:
  - details of what you have done
  - how learning objectives were met.
- Detail the process you undertook to review your program and the outcomes of your review. Include recommendations for how things could be done differently next time.

## Notes

# Learning Topics

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This section includes a number of Learning Topics, each containing background information and activities. Speak to your facilitator to determine which topics you need to complete. Some of the activities may be contextualised to suit your needs. These activities can be used as evidence for assessment.

This Learner Guide covers the following topics:

1. Learning through work at work
2. The facilitator of work-based learning
3. Planning the learning pathway
4. Developing the learning pathway
5. Implementing and monitoring work-based learning
6. Reviewing the learning pathway.

# 1 Learning through work at work

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Think about your own experience of learning through work.

- What did you learn?
- Why did you learn it?

Who taught you? Were others involved as well as the person who taught you?  
How were they involved? Why were they involved?

- Where did you learn?
- When did you learn?
- How did you learn?

How did you know you had learnt something? Were you ready for the next step?

Do you think this experience was an effective learning experience? What contributed to it being an effective or ineffective learning experience?

Talk to others about their experiences of learning through work.

In thinking about the experiences you and others have had of learning in the workplace, you realise how varied the experience of learning at work can be.

In this first Learning Topic, you will be introduced to what work-based learning is and the factors that affect work-based learning.

When you start in a new job, you probably need to learn how to use a piece of equipment or technology. You will also need to know how to do things according to the policies and procedures of the organisation you have just joined. The policies and procedures might be about the workplace, job role, safety and/or quality assurance. You might need to know things like how to behave, the expectations of working relationships, and agreed consequences of breaching ground rules.

During your time in the workplace changes will occur. So you will need to revise and add to your learning. For example, new technology or legislation could be introduced which may result in changes to operating procedures.

Sometimes you will learn these things as part of your normal work routine. Alternatively, you might learn about these things by having someone else supervise or guide you quite specifically. This person may be your supervisor or another worker. In either case, you can assume this person is experienced or expert in what they do and know.

Sometimes you will learn indirectly, by watching, listening or talking to others. For example, a problem may arise and you learn all the details of how it is dealt with by listening to other, more experienced workers discuss the problem. There are many things that can only be learnt in this indirect way.

Some of what you learn about your job and the workplace might not happen on the job. It could be in a training room or a meeting room. What you learn in this way should be integrated with what you learn on the job so that you are learning all the parts of your job in a logical order.

## Defining work-based learning

There are many different terms referred to in the context of work-based learning: work-based training, workplace learning, workplace training, workplace-based learning, on-the-job training and on-the-job learning.

In this guide, *work-based learning* is 'learning or training undertaken in the workplace that is on-the-job training under normal operational conditions'.

It is *not* 'on site training which is conducted away from the work process (for example, in a training room)'.

### Source:

Adapted from the Australian National Training Authority (ANTA) glossary. This glossary is available on the ANTA website at <<http://www.anta.gov.au>> accessed February 2005.

**Note:** At the time of finalising these resources the decision to abolish ANTA and transfer its responsibilities to the Department of Education, Science and Training (DEST) by July 2005 was announced. You might need to check the currency of the links provided in this resource in the transition period.

The ANTA Reframing the Future paper '*A new model of work-based learning in the VET sector*' (2001) says this about work-based learning:

*Work-based learning is an umbrella term that refers to structured learning that is organisationally managed and provided in association with paid or unpaid (voluntary) work. The focus of work-based learning is learning through work and its participants are the staff employed by an organisation.*

*Work-based learning... is a form of staff development rather than professional development because its focus is on building the capabilities of individuals within an organisation's internal workforce and not those on, or bound for, the external labour force.*

*This is not to say that work-based learning does not also give individuals generic and transferable professional development skills that will improve their employability elsewhere. Depending on the nature of the learning agreements struck between learners and their employer, it is possible for staff development and professional development to be tightly or loosely coupled.*

**Source:**

This publication can be found in the Publications section, sub-program 1: Staff Development, of the Reframing the Future website at:  
<<http://reframingthefuture.net>> accessed February 2005.



How do you define work-based learning? What is it called in your practice environment?

## **What is a work-based learning pathway?**

Think of a work-based learning pathway as a plan that you develop and implement to enable your learners to learn what they need or want to learn *on-the-job*.

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### **Snippet      Tailors' apprentices**

'Tailors' apprentices learn by participating in work activities that inherently structure their engagement in increasingly more accountable tasks and give them greater access to knowledge... The apprentices move through experiences that first provide access to the global—the overall goals required for performance—then the local—the requirements for particular performance. The apprentices first finish and iron completed garments. This provides a basis for understanding the overall requirements for their work. Next they learn specific procedures for constructing garments. The pathway of learning experiences is 'formalised' by a progression of tasks that carry increasing levels of accountability—that is, movement from tasks of low to high accountability (that is, those where mistakes can be tolerated to those where mistakes would have significant consequences). Access to models for performance, and direct



and indirect guidance, are provided for apprentices to learn tailoring on this pathway’.

**Source:** Billett S, 2001, p.16

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How extensive and complex the learning pathway is will depend on the goals the learner needs or wants to achieve.

For example, learning how to use a rake properly would take less time than learning how to use a large complicated piece of mining equipment. Developing the skills and knowledge to be a front-line manager for a large call centre would require a more complex learning pathway than learning to open and distribute the mail of a small business.

The purpose of an effective work-based learning pathway is to ensure that the learner learns all they need to know to do the job efficiently and safely. The facilitator works with the learner and anyone else who may be affected to develop the pathway that allows the learner to get to that point.

The diagram below represents the scale of learning pathways.



Add other examples of factors that could affect the complexity, size or timeline of a learning pathway.





Remember, to demonstrate competency in this unit, you will need to provide evidence of developing and implementing a minimum of two work-based learning pathways.

Start thinking about your learning pathways (who your learners are, what they need or want to learn, how you might help them achieve the learning goal).

What are your first thoughts about where you would place each of your learning pathways on the above scale?

You might want to think about this more as you work through this Learner Guide.

In developing an effective work-based learning pathway, there are many things you will need to consider.

A work-based learning pathway has details of:

- what will be done (job tasks or activities to be included in the learning process, details of actions or interventions)
- when these will be done (the sequence of job tasks or activities to reflect the learner/s incremental development)
- who will be involved (you, expert workers, co-workers, others)
- what they will be doing to enable the learning goals to be achieved (direct guidance, modelling and coaching).

It includes:

- specific goals for work-based learning
- opportunities for practice
- details of any additional levels of guided support needed to develop knowledge, skills or attributes that are required for more complex work tasks.

The pathway should also allow for some flexibility to cater for unanticipated opportunities for learning activities or interactions.

Your work-based learning pathway should include details of any external learning activities that the learner may be doing to achieve their learning objective. These activities could be at the workplace, but not work-based (for example, done in a training room). They could be provided by another organisation and done away from the workplace. You should make sure these external activities are integrated with the on-the-job activities you are proposing.

To be effective, your pathway should be developed in consultation with the learner as much as possible. If your learner knows why the learning is to take place, and has been involved in developing the sequence of the learning pathway, it is likely they will be more prepared to be involved during the implementation.

For the same reasons, if you are involving other workplace personnel, you should consult with them during the planning stage. For example, if you are expecting others to be involved in providing supervision, guidance or support either formally or informally, you should secure their agreement in advance. If your proposed learning pathway is going to affect others, you should also consult them.

Your choice of activities, interventions and actions in the work-based learning pathway draws on the wealth of experience your learner has. They should also take into account where support is needed and where it is not. Good facilitators don't just provide all the information to the learner. Instead, they work out ways to effectively draw out the experience of the learner and encourage them to think for themselves.

A good facilitator will make sure that the learner can transfer what they are learning to other work contexts.

The sequence of activities proposed should allow the learner to develop incrementally. This could mean learning simpler tasks before moving on to more complex tasks; building on their previous learning as they progress. It could mean giving the learner a 'low risk' task (such as sweeping the salon floor) before they gradually move on to tasks that would have a 'higher risk' if a mistake was made (for example, dying a client's hair incorrectly).



Look at the following snippets about work-based learning.

Is on-the-job learning always possible? Why or why not?

### When is on-the-job learning possible in your practice environment?

## Snippet      An apprentice builder's perspective

Learning on-the-job is the only way to go for me to get my apprenticeship. It's sensible. I get to do real things while I'm learning, so it's meaningful. John, my supervisor, knows that I'm getting a qualification, so he knows what I have to learn to be competent. We learn some things in the classroom at TAFE and I go back to work and practise during the tasks John sets me. It's a good combination—I learn lots in the classroom, but not everything.

John knows what I'm learning at TAFE and we've worked out ways to make sure I practise it as soon as possible. He makes sure that the order I learn things on-the-job is logical so I'm working safely and not hurting others. I've been learning easier things first and then building on what I've learnt when I move on to harder jobs that are more complicated. Gradually, John is giving me more responsibilities, like actually making decisions about how to do things, rather than just being told. Having a plan about what I'm going to learn, why I'm learning it and how and when I'm going to learn is good. I know what's happening and I know how well I'm going.

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**Snippet      A learner's perspective #1**

I work in a sugar mill. Try finding a course about how to work in a sugar mill!  
If I don't learn on-the-job, I don't learn how to do my job!

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**Snippet      A facilitator's perspective #1**

Our workplace is really noisy and dirty. That's the biggest challenge we've had in introducing a work-based learning program to teach the workers how to do the job. We all have to wear protective gear to cover our heads, faces, bodies and hands. We look like great big spacemen! It's hard to talk to each other with all that gear on.

It makes teaching and learning as part of the normal work routine really difficult. I'm not sure how we'll overcome it. The workers are complaining, understandably, but then they didn't like learning how to do their job in the training room either. So we'll have to work out how to rearrange the work situation to accommodate it if we decide to keep going. I'm looking into buying some microphones and headphones. I'm getting the OHS bloke involved, too.

---



What are some of the ways support is offered for work-based learning in the following snippets?

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### **Snippet      Organisational support for guided on-the-job learning**

I get a lot of support from the organisation to be a facilitator. I get time to learn how to be a facilitator—how to plan the learning pathway so staff learn easy things first and build on their skills and knowledge so they end up learning and doing the more complicated things. They are then able to apply what they've learnt to other situations.

I get time to prepare and I have a mentor to help me. The organisation gives time for the learners to learn on the job too, even the casuals, part-time and contract workers—the person on the end of the phone doesn't know what your employment status is, they just expect service.

I don't think this could work if the company I worked for didn't provide support for guided learning. I think it's probably easier in a big organisation like this. I can't imagine how feasible it would be in a small or medium sized company. But then again, a lot of the techniques that I have learnt to use are relevant to all work-based learning, regardless of the size of the company. So if you worked for a smaller company, you wouldn't necessarily have to have a really full-on, detailed, documented program like we have.

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### **Snippet      A learner's perspective #2**

What I like is that I learn a lot by just listening and talking to others and watching what they do. I spend time with my mentor, Angela, on Friday afternoons. Angela asks me what I've learnt during the week and how I've learnt it. Having this time with her gives me an opportunity to think about all that informal learning you do. If I've learnt something in this less structured way, we can check what I've learnt and that I've learnt it correctly. We can tick it off my 'things to learn' checklist—it saves learning something twice. Then I can move on to the next learning activity. We chat about where else I might use what I've learnt.

Angela has a real knack of knowing when I need support and when I can work it out myself. She's well-prepared and knows what's going on but not in a nosy way. I really like this way of learning, it's meaningful and I get to have a bit of control over what I'm learning, too.



Read the following snippets and discuss.

What are your thoughts about motivation as a factor in the success or otherwise of work-based learning?

Is the issue of motivation in work-based learning any different to motivation in other learning settings? Why or why not?

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**Snippet      A learner's perspective #3**

I've just had my yearly performance appraisal. It went really badly. Over the past few years the direction of the department has changed. They want me to do things I've never done before and I'm not interested in doing them. I liked things the way they were before. So it's been a real problem and now I'm in trouble.

My Department Head wants me to learn all these non-vocational things like time management and being more assertive. She wants to send me on some courses and then I have to practise what I've learnt during on-the-job activities with guidance from my boss. They think that it'll improve my work performance—they think that I'm too slow and that I get aggressive if asked how I'm going with my work. But, like I said, I don't want to do this 'new job' and I don't want to learn these personal things either. I'm not sure that I should be expected to change personal things for work purposes. I don't want to do it.

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**Snippet      Involving those less than keen to be involved**

This work-based learning stuff—they want you to help others. It's OK in theory, and I don't mind helping out, but they've asked me to be more involved because I've been here a long time. They haven't reduced my normal workload, and it seems like what they're trying to do will take me a lot of time. I'll have to do a lot of preparation—and that's before I even get started with the learner. They're not giving me any extra money and it's not on my duty statement. Hmmm... I don't know.



In the following snippets, what are some of the advantages and disadvantages of work-based learning? Who is being advantaged? Who is being disadvantaged?

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### **Snippet      A senior manager's perspective**

We've just introduced a program for guided on-the-job learning. We work in a very competitive industry and we are always trying to think of ways to improve our workers' skills so we can keep ahead of the competition. So we've given support to the Human Resources Department to conduct a program that will tie together the organisation's staff development activities with the strategies of the organisation.

We don't just want our workers to learn the basics of doing their job. We want them to extend themselves by learning skills like problem-solving, team work and communication skills. So the activities we get them to do build these things in as much as possible.

It's a lot of work; very time consuming to organise and run. We've got to develop learning pathways that are customised for each learner and cater for any needs they may have. For each worker, we find out what their current level of knowledge, skills and attributes are, as well as what their language, literacy and numeracy skills are. We have a diverse workforce—we have men and women, people of all ages and from different backgrounds and cultures. We also have some workers who have a disability—one has a physical disability and another has an intellectual disability. A lot of the workers on the production line left school quite early because they didn't like it. This has an impact on how they react to learning on-the-job, too.

Our facilitators who plan work-based learning pathways have to be very aware of these differences, and even more so if the work-based activities they include in the learning pathway involve a group of learners. But I think the work will be worth it. We think that the employees will benefit (more skills, perhaps pay rises etc, better chance of other jobs) and so will the company. We will have workers who have the skills to be innovative.

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### **Snippet      Going beyond just learning by doing**

It's a lot of work to organise guided on-the-job learning. I'm happy to do it because a supervisor teaches on-the-job anyway if there are new people, new equipment or new policies or procedures. I think it is better than just hoping that everyone learns what they need to know to do their job well and safely. I like knowing how to organise and facilitate on-the-job training. I think it's good for me, professionally. I've gone from being a cleaner to a supervisor and now that role has been extended to include training— if I do it well, it will open up more job options for me in the future.

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In the following snippets, what techniques and methods are being used to meet the learning goals?

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### **Snippet      Learning what is difficult to learn**

I work as a fruit picker. It's hot and tiring work. The boss says 'go out and pick the fruit'. Well they tell you a bit more, but there is a lot of pressure to get the fruit picked in a short amount of time, so they forget things. And it's not as if it would be possible for them to write everything down for us to read when we go out there on our ladders in the cherry or peach trees, or on our knees in the strawberry patch! So they expect the more experienced workers to guide us as we work.

So I talk to them. They're great. They tell me things like where and how to place the ladder. They show me ways to keep cool and where I can get knee pads if I need them. And they've shown me some exercises to do so I don't get too sore. They tell me how to pick the fruit so it's not damaged. Because of this, I'm more productive, there's less waste and I earn more. I watch others and they watch me and then I feel more capable and less scared that I might get a sore back or fall out of the tree.

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### **Snippet      A learner's perspective #4**

I work for a large retail company. We've had a few complaints about customer service, so we're trying to improve it. Our facilitator really believes in encouraging the learners to take responsibility for their own learning. So they introduced action learning as a way for us to improve our customer service performance.

Regardless of our level, we all work on this project at set times. Others are brought in to fill the roster while we learn. At first, some of us researched what better customer service means (on the Internet, and asking people who work in other companies) and others looked at the company's policies and procedures. We shared all this information with each other and worked out what we wanted to achieve and how we would get there.

At the moment, we are taping ourselves to analyse how we are dealing with customers—both on the phone and face-to-face. The facilitator has developed some scenarios to practise better customer service techniques. We learn from what we are doing and we are getting better. It's been a great way to learn, on-the-job; much better than just being told to read a book or sit in a training room and be lectured. Of course, not all workplace learning can happen like this—I'm just glad I had the opportunity to be involved.

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### **Snippet      A facilitator's perspective #4**

Our production line workers have to make sure things are going smoothly. They have to use a spanner to either tighten or loosen the appropriate nut if things aren't going right. The problem is, some have never used a spanner before and aren't sure which way to turn it. We came up with this little ditty 'righty, tighty; lefty, loosy' to remind them which way the spanner needs to be turned depending on how they need to fix things. It works all the time... imagine what would happen on the production line if a worker turned the spanner the wrong way!

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To find out more about work-based learning, refer to the following.



Billett, S 2001, *Learning in the Workplace. Strategies for Effective Practice*, Allen and Unwin, Sydney. For an overview of work-based learning, the following chapters are relevant:

- Chapter 1—*Working and Learning*
- Chapter 6—*Organising and managing workplace learning.*

Burns, R 2002, *The Adult Learner at Work. The Challenges of Lifelong Education in the New Millennium*, 2<sup>nd</sup> edition, Business and Publishing, New South Wales. (particularly Chapter 8: '*Implications for Teaching, Training and the Organisation*').

National Centre for Vocational Education Research (NCVER), 2003. *At a Glance What makes for good workplace learning*  
<<http://www.ncver.edu.au/research/core/cp0207.pdf>>accessed February 2005.

Hagar, P 1997, *Learning in the Workplace. Review of Research*, NCVER, Adelaide.

Field, L '*Organisational learning: basic concepts*' in Foley, G (ed) 2000, *Understanding Adult Education and Training*, 2nd edition, Allen and Unwin, Sydney.

## 2 The facilitator of work-based learning

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You are a facilitator of work-based learning.

You might call yourself a facilitator, trainer or teacher.

Or you might think of yourself as a workplace supervisor or a team leader. You might be a training, human resource or industrial relations manager or consultant.

Each of these roles includes the task of facilitating work-based learning.

Regardless of what you call yourself, what do you think the role of the facilitator is? If you are going to be an effective facilitator of work-based learning, what do you need to know? What skills and attributes do you think you need?

This Learning Topic explores these questions.

## **The role of a workplace facilitator**

What is your role in your practice environment?

Are you:

- developing the work-based learning pathway
- implementing and monitoring the work-based learning pathway
- reviewing the work-based learning pathway
- assessing learners for the purpose of them obtaining a qualification or a statement of attainment
- providing or arranging any equity or access support for your learners
- performing a combination of these roles?

### **Developing, implementing, monitoring and reviewing work-based learning**

What does it mean to deliver training and facilitate learning? The two terms imply some difference in style and approach.

When we talk about delivering training, the emphasis is on the trainer rather than the learners.

Conversely, to speak of facilitation is to place the primary focus on the learners where it belongs.

According to the Macquarie dictionary, to facilitate is to make something easier or less difficult; also, to help forward a process. Facilitation may help someone move forward with an action or a process. In our case, the process is learning.

When you are facilitating, the focus of your attention needs to be on both the content and the process. In any learning context, including work-based learning, both are important. Learners certainly need to learn; at the same time they need to do so in a way that is meaningful and draws on their previous knowledge and experience.

Facilitation requires the facilitator to create an environment and a process that supports individuals or a group of learners as a whole, to achieve their goals.

Facilitation is the process of enabling learners to learn more effectively. Where learning is done in groups, this will involve having learners work cooperatively and effectively together.

How will you ensure that the work-based learning you facilitate satisfies adult learning principles and encourages the learner to take responsibility for their own learning?



The following book may be useful in exploring a range of facilitation approaches.

Hogan, C 2003, *Practical Facilitation: A Toolkit of Techniques*, Kogan Page, London.

To find out more about facilitation, look at the following websites:

- Bressen, T. *Facilitation Points*  
<[http://www.treegroup.info/toolbox/B11-facilitation\\_points.html](http://www.treegroup.info/toolbox/B11-facilitation_points.html)>
- Co-Intelligence Institute. *Facilitation*  
<<http://www.co-intelligence.org/P-facilitation.html>>
- Thiagi *Secrets of Successful Facilitators*  
<<http://www.thiagi.com/article-secrets.html>>

Your learner may be learning some things on-the-job and other things off-the-job. This could be:

- at the workplace but not as part of work routines, for example in a training room
- through an external provider such as an RTO or university.

If this is the case, do you have any say in what and when your learners learn off-the-job? Do you know what your role is in integrating the learning activities?

## Assessing the learner

It is likely you will be assessing your learners at some level.

Assessment activities may be given:

- before learning occurs (pre-assessment). This could be for a variety of reasons, including:
  - recognition of current competencies. Learners may already have some or all of the knowledge and skill requirements from previous life, work and study experiences. This will have an impact on what learning activities are done and how they are sequenced.
  - language, literacy and numeracy requirements. Assessment can be conducted specifically to determine the language, literacy and numeracy competencies of learners. It may be used as a selection tool for learning programs or to identify further training required in those areas.
  - identifying training or education needs. Assessment can be conducted to plan suitable training or education programs. The benchmark or criteria for assessment could be position descriptions, skills in using a piece of equipment or other organisational standards.

Pre-assessment activities are very important because they connect the learning pathway to the particular individual who is taking on the job.

- during the course of the learning at different intervals (formative assessment).

Formative assessment is useful for monitoring the learner to find out:

- if they are learning during the process
- if they are ready to take on new tasks and responsibilities
- if alternative approaches are necessary to improve the learning
- if their learning is having an impact on their work performance.
- on completion of training either on- or off-the-job (summative assessment). This is done at the end of the learning (or sequence of learning) and involves assessment against all the requirements of the benchmark. Summative assessment could be done for the purpose of issuing formal credentials such as qualifications or a statement of attainment.

Is your learner undertaking accredited training that will result in them obtaining a qualification or a statement of attainment if they are deemed to be competent?

To be issued with a nationally recognised qualification or a statement of attainment, summative learning activities must be carried out by a qualified assessor. This is one of the requirements of the Australian Quality Training Framework's (AQTF) Standards for Registered Training Organisations.



More information about assessment is available in the Learner Guides for the following units of competency:

- TAAASS401A *Plan and organise assessment*
- TAAASS402A *Assess competence*
- TAAASS403A *Develop assessment tools*
- TAAASS404A *Participate in assessment validation.*

### **Providing support for your learner**

All learners will need support during the learning process. Part of the planning process involves identifying and organising support mechanisms.

While every learner has their own learning needs, you may also have learners whose special needs must be considered. These special needs are often referred to as access and equity issues.

You will need to plan for and provide additional support to enhance the participation of learners with special needs. While this is covered in more detail in Learning Topic 3: 'Starting to plan the learning pathway', it is important to realise this is part of your role. You will need to:

- understand equity and additional support issues
- know how to provide appropriate support
- be able to offer support when necessary
- keep up-to-date with the issues and with information about who can provide assistance to you or the learner with special needs.

More information about this can be found in the Learner Guides for TAADEL401A *Plan and organise group-based delivery* and TAADEL402A *Facilitate group-based learning*.

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### **Activity      What is your role?**

Find out what your role in facilitating work-based learning is. Keep documentation about this in your resource kit.

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## Knowledge

You know what work-based learning is, and you know what factors affect the quality of work-based learning. You have also considered how all of this applies (or doesn't apply) in your practice environment.

As the facilitator of work-based learning, you also need to know about:

- how adults learn and their preferred learning styles
- your practice environment's legislative and regulatory environment (including OHS)
- the various techniques that can be used to facilitate learning, for example coaching and mentoring
- the subject matter content of the learning program
- how people respond to change.

## Learning principles

Most adult learners enjoy learning and remain motivated if the learning program follows adult learning principles including:

- establishing a relationship based on respect, openness and equality
- allowing learners to direct their own learning
- acknowledging and utilising learners' life experiences
- learning by doing
- satisfying learners' need to know why they are learning something
- providing opportunities for reflection and debate
- providing opportunities for collaboration
- using repetition to reinforce learning.

### Source:

Vocational Education & Assessment website <<http://www.veac.org.au>> accessed February 2005.



These principles of adult learning were originally put forward by Malcolm Knowles. The details of Knowles' original texts are:

- Knowles, M 1970, *The Modern Practice of Adult Education: Andragogy Versus pedagogy*, New York Association Press (and later editions)
- Knowles, M 1990, *The Adult Learner: A Neglected Species*, 4<sup>th</sup> edition, Gulf Publishing, Houston (First published in 1973).

There is a lot of information on the Internet about the principles of adult learning. Here are some websites to start with:

- What are the Principles of Adult Learning? – Southern Health  
<[http://www.southernhealth.org.au/cpme/articles/adult\\_learning.htm](http://www.southernhealth.org.au/cpme/articles/adult_learning.htm)>  
accessed February 2005.
- WestOne  
<<http://www.westone.wa.gov.au/toolboxes/equity/site/bridging/alp/>>  
accessed February 2005.
- Vocational Education and Assessment Centre  
<<http://www.veac.org.au/tchlearn.html>> accessed February 2005.

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### **Activity      Implement adult learning principles**

Research the principles of adult learning and how to implement them.

Think about how you will incorporate adult learning principles into your work-based learning pathway.

Write your ideas about this in your resource kit.

Discuss your ideas with other people.

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## Learning styles

When planning and facilitating any learning, including work-based learning, it is necessary to remember that learners will have different preferred learning styles that may impact on the sorts of activities that will motivate and engage them.

Think about yourself for a moment... do you learn best by *reading* or by *listening*? Perhaps you prefer to learn by *doing*...

While work-based learning implies that there is a lot of *doing* happening, part of learning how to *do* could involve *listening* to others or *reading*. There may be times too, for OHS reasons perhaps, where it is not possible to *do* before undertaking other learning activities.

Four well-known models of preferred learning styles are:

- visual, audio or kinaesthetic preferred learning styles
- pragmatic, reflective, activist or theoretical preferred learning styles
- left/right brain
- global/analytical.



You can find out about some of the theories of learning styles by looking at the following:

- The Learner Guide TAADEL401A *Plan and organise group-based delivery*. In Learning Topic 1 of this guide you will find details of the different learning styles as well as more references.
- For an overview of the importance of learning styles, and a summary of some of the more well-known theories, a good place to start is to visit the Flexways website at:  
<<http://flexways.flexiblelearning.net.au/learning/index.asp>> accessed February 2005. While you are in this site, complete the simple questionnaire which will identify your preferred learning style.
- For a comprehensive site with a range of links to other sites about learning styles, visit the Support4Learning site at:  
<<http://www.support4learning.org.uk/education/lstyles.htm>> accessed February 2005.
- The Indiana State University site has useful information on learning styles in general, and also the implications for teaching:  
<<http://www.indstate.edu/ctl/styles/lsl.html>> accessed February 2005.



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<b>Activity</b>	<b>Preferred learning styles</b>
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Research preferred learning styles. From the information you gather:

- summarise the key features of each learning style
- develop a list of what people with each learning style would enjoy and what would support their learning, as well as what they would dislike in a learning experience.

How do you think you will cater for the different preferred learning styles of your learners in the work-based learning pathway you are facilitating?

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## **Legislative and regulatory environment**

When planning and facilitating work-based learning, it is important to have knowledge of the legislative and regulatory environment in which you operate.

You should have knowledge of:

- relevant legislation, codes of practice and national standards, including Commonwealth, state or territory legislation, licensing requirements and OHS obligations
- organisational policies and procedures, including internal policies and procedures to meet OHS requirements and hazards commonly found in the work environment to which learning is related.

Examples of laws, policies, procedures, codes of practice and standards may include, but are not limited to:

- the Australian Quality Training Framework (AQTF)
- ensuring fairness of learning opportunities
- competency standards
- licensing
- industry and/or workplace requirements
- duty of care under common law
- recording information and confidentiality requirements
- anti-discrimination including equal opportunity, racial vilification and disability discrimination
- workplace relations
- industrial awards and/or enterprise agreements
- National Reporting System
- OHS legislation.

## Requirements under the AQTF

Within the vocational education and training (VET) sector, there is a requirement to conform to a substantial body of state and federal legislation in order to comply with the AQTF standards that have been established to guide, regulate and monitor the system.

The AQTF sets out the standards for:

- training/assessment organisations that offer nationally recognised qualifications (Registered Training Organisations—‘RTO’s)
- state and territory bodies that register and audit RTOs and accredit courses.

If you work for a Registered Training Organisation (RTO) or for a training/assessment organisation that is working with an RTO to provide accredited training, you must be aware of the AQTF, particularly the *Standards for Registered Training Organisations (RTOs)*, and you must comply with these standards.

To comply with the standards, the RTO is required to:

- record the systems in place to provide quality training and assessment across all training operations
- keep written policies and procedures for ensuring quality training assessment that is consistent with its scope of registration and scale of operations, in order to actively identify and practice continuous improvement of its systems
- review all of their operational processes on a regular basis. This includes reviewing their assessment process; the currency and relevance of their materials, policies and procedures; and the performance levels of their staff.

What you are doing in developing and facilitating a work-based learning pathway may be just one part in wider processes, such as reporting, reviewing or evaluating.

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## **Activity      Finding out about the AQTF**

Familiarise yourself with the focus of the AQTF by visiting  
<<http://www.anta.gov.au/aqtf/What.asp>> accessed February 2005.

Look at the list of standards for RTOs. What do they cover? Which apply to your practice environment?

What do the RTO standards say about contractual requirements and responsibilities?

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## **Activity      Finding out about the legislative and regulatory environment**

What do you already know about the legislative and regulatory environment in your practice environment?

What else do you need to find out so you can plan and facilitate a work-based learning pathway?

Sources of information include:

- people
  - within your practice environment: policies and procedures personnel, operational managers, risk management personnel, legal staff, corporate governance staff, human resources personnel, or OHS personnel
  - external to your practice environment: State Training Authority (STA) personnel or people with specialist knowledge.
- documentation
  - this could be sourced internally or externally. For example, your practice environment's policies and procedures manual.
- websites
  - for legislation, regulation and case law, go to the Australasian Legal Information Institute (AUSTLII) website at:  
<<http://www.austlii.edu.au>> accessed February 2005.
  - for national strategies and directions in VET including those related to ensuring fairness of learning opportunities, access various documents on the ANTA website at: <<http://www.anta.gov.au>> accessed February 2005.

**Specific pages on the ANTA website are:**

*National Strategy for VET 2004–2010*

<<http://www.anta.gov.au/dapStrategy.asp>> accessed February 2005.

*Partners in a Learning Culture* (the five-year national strategy 2000–2005 for increasing opportunities for indigenous people in VET)

<<http://www.anta.gov.au/dapLearning.asp>> accessed February 2005.

*Bridging Pathways* (the five-year national strategy 2000–2005 for increasing opportunities for people with a disability in VET)

<<http://www.anta.gov.au/dapBridging.asp>> accessed February 2005.

- for information about VET in your state, contact the State Training Authority in your State or Territory. The websites for all State Training Authorities can be accessed via the following ANTA website at:  
<<http://www.anta.gov.au/dapequity.asp>> accessed February 2005.
- for information about the Australian Quality Training Framework (AQTF), including information about Standards for Registered Training Organisations (RTOs), go to the relevant page on the ANTA website at:  
<<http://www.anta.gov.au/aqtfWhat.asp>> accessed February 2005.
- for information about privacy, go to the website of the Office of the Federal Privacy Commissioner <<http://www.privacy.gov.au/>> accessed February 2005.
- for information about copyright law, go to the website of the Australian Copyright Council <<http://www.copyright.org.au>> accessed February 2005.
- for information about competency standards and Training Packages, go to the National Training Information Service (NTIS) website  
<<http://www.ntis.gov.au>> accessed February 2005.
- for information about OHS and duty of care go to the National Occupational Health and Safety Commission (NOHSC) website  
<<http://www.nohsc.gov.au>> accessed February 2005.

Include the details of what you already know and what you have found in your resource kit. Make sure you use this information as you plan and facilitate your work-based learning pathway.

Remember that things change, so keep this information up-to-date. At the time of finalising these resources the decision to abolish ANTA and transfer its responsibilities to the Department of Education, Science and Training (DEST) by July 2005 was announced. You might need to check the currency of the links provided in this resource in the transition period.

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## **Occupational health and safety**

As a facilitator of work-based learning, you will need to know the OHS provisions relating to the work role.

This will include:

- knowledge of OHS legislation (see above)
- the organisation's OHS policies and procedures
- hazards that are commonly encountered in the industry and specific workplace
- what the reporting requirements for hazards and incidents are
- the specific procedures for work tasks
- the safe use and maintenance of relevant equipment
- the emergency procedures
- where you can source OHS information relating to all of the above.

A basic knowledge of OHS considerations in the workplace is essential to ensure that the work-based learning pathway you are proposing does not have an OHS impact on the learner or on others.



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### **Activity      Finding out about OHS in your practice environment**

Using the list above as a guide, think about the following questions:

- What do you already know about OHS in your practice environment?
- What else do you need to find out so you can plan and facilitate a work-based learning pathway?

Include the details of what you already know and what you have found in your resource kit.

Include details about how you found out this information. For example:

- who did you speak to?
- what sources did you use?
- what was useful during the process of collecting, analysing and organising this information?

Don't forget to:

- use this information as you plan and facilitate your work-based learning pathway.
  - keep this information up-to-date—things change.
-

## Coaching techniques

A coach is job-focused and performance-oriented, attempting to direct a person to some end result.

The term 'coaching' is most often heard in the context of sports. However, it is a concept that is very relevant to the work situation.

*Coaching is 'guidance and monitoring by a more experienced co-worker or expert, of learners conducting work activities. The provision of hints, feedback and clues, as well as demonstrating, modelling and explaining 'tricks of the trade' can assist the development of workplace procedures through coaching'.*

**Source:** Billet, 2001, p. xiv.

There are several coaching models available for training skills and an excellent model is used in the outdoor education sector. Two units of competency in the *SRS03 Sport Industry Training Package—SRSCNO011A Teach or develop the advanced skills and tactics of slalom canoeing*, and *SRSCGP018A Coach participants*—specifically call for the use of the DEDICT Model. This model applies equally well to other sectors.

Here is the DEDICT model for skill-based training:

- |                      |   |
|----------------------|---|
| <b>D Demonstrate</b> | Initially, you provide learners with a global overview by demonstrating the skill in real time. Learners can see what the skill is all about. However, it is not possible to take in all the details at once; it is hard to watch both arms, both legs and the rest of the body in close detail. This is why the next step is so important. |
| <b>E Explain</b>     | Here, the trainer explains the skill in sufficient detail for the learners to understand the major requirements of the skill or task. At this stage, you can highlight key areas. Sometimes, especially with whole body skills, it is useful to explain how to distribute body weight, or where the major weight is carried.                |

- D Demonstrate slowly** Now that learners know what to look for, it is time to demonstrate the task or skill again. This time, do so very slowly so that learners have sufficient time to focus on the various body parts as they complete the task.
- I Imitate** Now it is time for the learner to begin their practice. Initially, they imitate the trainers' performance. This is done under close supervision. The learners imitate your demonstration and carry out the task slowly while you supervise closely.
- C Coach** The trainer supports the learner as they start to modify and refine their initial imitation. Coaching provides critical distinctions for the learners so they can fine tune their individual skills.  
Coach the learners through the steps to ensure that they do it correctly. Support them to refine their skills through self-reflection and feedback.
- T Test or Trial** After adequate coaching, it is time for the learners to test their skills and practice them independent of the trainer. This could be equated to going solo. Allow the learners to practise on their own. Encourage them to take ownership of their new skills.

## Mentoring

Mentors, in either a formal or informal relationship, focus on the person and their career and provide support for individual growth and maturity.

Mentoring Australia defines mentoring as a '*mutually beneficial relationship which involves a more experienced person helping a less experienced person to achieve their goal*'.

They define effective mentoring as being a relationship that:

- *focuses on the needs of the mentee (the person being mentored)*
- *fosters caring and supportive relationships*
- *encourages all mentees to develop their full potential*
- *develops active community partnerships.*

**Source:**

Mentoring Australia <<http://www.dsf.org.au/mentor/index.htm>> accessed February 2005.



The Learner Guide for TAADEL403 *Facilitate individual learning* provides more detail about coaching and mentoring techniques.

There are lots of references about coaching and mentoring. These four references discuss these techniques in the context of work-based learning:

Billett, S 2001, *Learning in the Workplace* (particularly Chapter 5: 'Guided Learning at Work' pp. 147-148 for coaching and pp.153-161 for mentoring).

Burns, R 2002, *The Adult Learner at Work*, (particularly pages 285-289 for information about mentoring as a learning tool).

Marsick, V J & Watkins, K E 1999, *Facilitating Learning Organisations. Making Learning Count*. Gower, England (particularly pp. 160 – 167 for mentoring).

Zeus, P & Skiffington, S 2000, *The complete guide to coaching at work*, McGraw-Hill Companies, Inc, Sydney.

## Subject matter content

Depending on your role, you may be planning the learning pathway and/or facilitating the learning. In either case, you need to know the subject matter of the learning program.

Are you a content expert? How do you keep up with changes?

Here are some ideas:

- read journals
- attend industry meetings or conferences
- visit learners on work placements
- visit worksites
- undertake return-to-industry programs
- network to access latest information
- take up membership of professional organisations
- share information at staff meetings
- keep up with manufacturer's developments
- use information from technical manuals on equipment
- invite manufacturers to give sessions on new developments
- work on spare equipment with trainees
- go out to the workplace and observe everyday work life
- teach in various skill areas actually using the 'live production system'
- train on-the-job in the learner's working environment
- study new procedures when a new piece of equipment is upgraded
- undertake courses to maintain credibility.

### Source:

Margaret Peoples, 1997, *Good... better...best! A self-evaluation activity for vocational teachers and trainers*, ANTA.

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## Activity      Keeping up with changes in the subject matter

What sort of activities, such as those in the list above, do you currently undertake to keep up with changes?

Investigate some new activities that you could carry out so that you are up-to-date in your subject area, in areas such as changes to technologies, products, processes and compliance, and legislative requirements.

Develop a personal action plan for keeping up with changes.

Carry out and report on at least one activity where you have enhanced your content knowledge. Give a practical example of how this will affect the subject matter content in your practice environment.

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## Change processes

In all jobs, there is a need to learn new things on a continuous basis. Changes in the economy, such as globalisation, as well changes as in social structures and institutions, technology, science and work practices, mean that change become built in to people's lives. You can no longer just learn to do a job, build on this through experience, then relax into the routine of work activity without ever thinking about it again.

As a facilitator of work-based learning, your main goal is to create change. The change might be to your learner's knowledge, skills and/or attributes. The work you do may also result in a change to work practices and routines. Because of this, it is important that you know how people work through change and what behaviours are associated with change.

Perhaps you already know about change processes. There are many references that cover this topic—any book about management will have a section on change management.



A useful book to start with is *Meeting the Challenge of Change*, by Sharon Johnson (Eastern House, Croydon, 2001).

People react to change differently. One person might react strongly in a negative way and resist the change. Someone else might react to the same change in a positive way. It is important to remember this when involved in an activity that is going to result in a change in the workplace which affects an individual or group.

In situations where people are responding to change positively, you might find people are happy to help bring about the change. They might:

- ask to be involved
- do what is expected of them quickly and efficiently
- 'champion' the change by telling others about it and its benefits.

In situations where there is resistance to change, a person might be resisting because:

- they might think they can't cope with the change
- they might not understand the change and its effects because these have not been communicated clearly
- the change may result in a change in their status
- they don't trust the person who is proposing or promoting the change
- the change makes them feel powerless. Their resistance to change actually gives them a sense of purpose which improves their sense of control. Saying 'no' can give them a sense that they are back in control
- resisting gives them attention
- they don't think the proposed change will improve things in the way being suggested
- they feel there has been enough or too much change
- the proposed change has a result that conflicts with their values.

Regardless of the reason for the resistance, people may respond in different ways:

- Open resistance—easier to deal with because at least it is out in the open.
- Closed resistance—more difficult to deal with because it is hidden from the person proposing the change. People who are resisting the change in a closed way may be reacting by being absent; by not being involved; by being involved in a way that draws the process of change out; by putting problems in the way; by gossiping; by making jokes about the changes; by wasting time; by spending time on personal matters; or by looking busy but being ineffective.
- They may not be able to cope with the change and they may react by becoming enraged, depressed or personally hurt. They may be less productive; make mistakes; be absent, hostile, resentful, sad, or discontented; have anxiety attacks; or yell, scream or kick furniture.

**Source:**

Adapted from Chapter 5: *Dealing with resistance to change* in Sharon Johnson's *Meeting the challenge of change*, Eastern House, Croydon, 2001.



## **Activity      Overcoming resistance to change**

Find out and document some ways that you can:

- encourage people to respond to change positively in the first place
  - overcome resistance to change.
- 

## **Skills and attributes**

Facilitators of work-based learning need particular skills and attributes. These include being able to:

- communicate with the learners and anyone else involved (for example, to build rapport, provide feedback, report, identify needs, reach agreement on the learning path)
- read and interpret contractual arrangements and complete and maintain documentation
- manage team dynamics
- undertake any required supervisory tasks
- coach and/or mentor learners
- establish action learning processes where appropriate.

To establish and facilitate learning in the workplace, a facilitator needs to be able to analyse the connection between an organisation's strategic goals, learning strategies and learning opportunities. They also need to have planning skills to establish learning tasks and activities in an appropriate sequence and to plan the learning around work. Sometimes, things may not go to plan and the facilitator will require problem-solving skills to address these contingencies.

All or some of this may involve working with others and perhaps in a team, so a facilitator needs the skills to be able to do this where necessary.



What other skills or attributes do you consider necessary to facilitate work-based learning in your practice environment?

To what extent do you have these skills and attributes? If you do not possess them already, one way of obtaining these skills and attributes is to practice using them as you work towards gaining this competence.

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### **Activity      Using your knowledge, skills and attributes**

As you work through the rest of this Learner Guide, make notes about the knowledge, skills and attributes you are using.

Add details about where you think you need to improve, along with any ideas you have for how to improve.

Practise using your knowledge, skills and attributes.

Reflect on this as you go.



Reflect on your past experience as a learner.

Who are the teachers, trainers, lectures and facilitators who stand out in your mind?

What was significant about the way these people acted?

What facilitation behaviours did they demonstrate?

What was the impact of these behaviours on the learner/s?

Which of these behaviours do you think can be used when facilitating a work-based learning pathway?

### 3 Starting to plan the learning pathway

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You have been introduced to work-based learning and work-based learning pathways. You have thought about the role of a work-based learning facilitator and the knowledge, skills and attributes of a good work-based facilitator.

Now it is time to start facilitating work-based learning.

In this and the next Learning Topic, you will begin to find out what is involved in planning work-based learning.

Planning and preparation is essential in any learning program, whether it is in classroom, via distance, or work-based learning activities.

By finding out about the workplace and your learners through research and discussion with others, you will be able to develop a work-based learning pathway. That is, an action plan for how the learning will progress in conjunction with the learner's normal career development.

In the first instance, you must consider:

- the purpose or objective of the learning
- who your learner is. This includes finding out what their preferred learning style is; what their profile and characteristics are; and whether you need to arrange or provide any additional support to cater for them.

When you are planning, think about the following questions:

- Who are the learners?
- What will they be learning?
- Why are they learning this?
- How will they learn?
- Where will they learn?
- When will they learn?

Remember, to demonstrate competency in this unit, you must provide evidence of developing and implementing a minimum of two work-based learning pathways. As you work through this Learning Topic, think about the learning pathways you might facilitate and start to plan them.

## The purpose or objectives of the learning

Learning purposes or objectives state what the learner is to learn as a result of participating in the learning experience.

For the rest of this Learner Guide, the *purpose or objectives* will be known as *the goals*.

Goals are about *why* the learner is learning.

Work-based learning could be necessary because:

- there is a need to develop workplace competence
- new technology or a new product or service has been introduced
- there is a new organisational direction or a workplace change
- staff have been given new positions or job roles
- a gap or deficit in skills has been identified and needs addressing
- there are new and/or additional OHS requirements
- quality improvements are required
- an individual or group may be required to or want to achieve a qualification or statement of attainment
- an employee or group of employees may be undertaking a traineeship or an apprenticeship
- an individual may want to achieve a personal outcome, such as improving their time management skills.

How do you determine the goal of the learning? You need to know three things:

1. What you want your learners to achieve (or what they want to achieve).
2. The standard, or benchmark, by which you and they will know they have achieved their goals.
3. What your learner's current level of knowledge, skills and attributes are.

There are a number of ways you can find out the goals of the learning. One way is to discuss this with the relevant personnel. These people might be:

- the learners themselves
- workplace supervisors and/or frontline managers
- experienced or expert co-workers
- training, human resources or industrial relations managers
- trainers, facilitators, assessors
- training/assessment organisation personnel
- group training company personnel.

## What do you want the learners to achieve?

Is it:

- knowledge
- a new skill
- a new attribute
- a combination of these?

### Knowledge

Will your learner need to learn new knowledge, such as the facts, concepts or principles required to competently perform an activity? Do they need to learn the policies and procedures of the workplace and/or the work role?

For example, a newly employed truck driver on an interstate trucking route needs to know the way to travel to ensure that the goods are delivered on time and without breaking any road rules such as speed limits or height and weight restrictions.

### Skills

Does your learner need to learn a new skill? A new skill is defined as the mental or physical ability to competently perform an activity.

For example, someone who conducts assessments would need skills to apply various assessment methods or tools relevant to the workplace. Someone mixing chemicals and recording the usage of chemicals for a gardening job would need the appropriate literacy and numeracy skills to do their job.

## **Attributes**

Does your learner need to learn a new attribute? Attributes are defined as a predisposition to behave in a certain way to competently perform a work activity that could include standards of behaviour, values or beliefs.

For example, a concern for accuracy in information presented or documents produced would be a desired attribute for a data entry person or a person writing reports for a client.

Being punctual, respecting confidentiality, working to a schedule, respecting others and being flexible are other examples of attributes that may be necessary or desirable in a workplace.

## **Benchmarks**

What is the benchmark or standard you want learners to reach?

Depending on why the learning is necessary, the benchmark or standard could be:

### **A unit of competency**

A unit of competency is one unit within a set of competency standards in the endorsed component of a Training Package or in an accredited course. Training Packages are an integrated set of nationally endorsed competency standards for a specific industry, industry sector or enterprise. They represent the national industry benchmarks for nationally recognised vocational outcomes in the Australian VET system. A unit of competency is made up of elements of competency, together with performance criteria, a range of variables and an evidence guide.

### **Criteria for performance**

Criteria for performance could be, for example, improving sales figures, being more profitable, improving productivity. These are usually internally determined.

### **Safety criteria**

Safety criteria could be a reduction in accidents or days away from work because of accidents.

## Compliance requirements

There may be a need to comply with internal policies and procedures (including codes of conduct) or external legislative and regulatory requirements.



What other benchmarks or standards can you think of?

What are the learning goals for the trainees Grace is working with in the following case study?

What about her staff?

What are the benchmarks used by Grace?

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### Case study Introducing Grace and her work-based learning program

Alinka: 'How's work, Grace?'

Grace: 'Oh it's good. We had a new trainee start last week, so I've got my facilitator's hat on again.'

Alinka: 'Another trainee? How many is that?'

Grace: 'This is the fifth one our unit has had. Working with the TAFE institute and the trainees so that they can get their qualifications has been wonderful.'

Alinka: 'In what ways?'

Grace: 'Well, I've learnt heaps myself. I've had to learn about trainees—I think they're called New Apprentices these days. They have to have a training plan. It's worked out with the New Apprenticeships Centre (NAC) and the Registered Training Organisation (RTO), and we have some involvement too. Our trainees are learning some of the record keeping units of competency. They're part of the Business Services Training Package. What the trainee learns working with me and others in our unit depends on what qualification they want and what level the qualification is. And then it depends on which units of competency they are doing to make up that qualification. When I was reading about Training Packages, someone described Training Packages as a big jigsaw puzzle where all the pieces can be put together, but the results can be all different shapes. They were right! Some of my trainees only want to do one or two record-

keeping units of competency, because they want a more general business qualification. Another might do a specialist record-keeping qualification with lots of record-keeping units.

'There have been benefits for the other workers too. I put all this effort into planning the learning pathway for the trainee and then implementing it and monitoring their progress. The end result for the trainee is a qualification. But I've realised I can do the same for my own staff—they are doing the same tasks. Even if they don't want a qualification, we use the record-keeping units as the basis for their staff development activities. And they could get a qualification out of it if they wanted to as well!

'And I think having the trainees has made me a better Records Manager. I really have to think about what we do so I can make sure the trainees and my staff learn the right things in accordance with the units of competency. I've really had to think about the record-keeping tasks we do, how we're supposed to do them and to what level of performance. There are lots of general skills involved too, like customer service and working in a team. I already knew about the Australian Standard for Records Management and I try to comply with that. But what I found out with the work I've been doing setting up and implementing the learning pathways for trainees is how closely aligned this standard is to the units of competency. Its like the units of competency give me the information about what records staff should do and how they should do it to be able to comply with the Australian Standard.'

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You will find detailed information on units of competency, qualifications and Training Packages on the National Training Information Service (NTIS) website at <<http://www.ntis.gov.au>> accessed February 2005.

More information about Training Packages can be found in the Learner Guide for TAADES401A *Use Training Packages to meet client needs*.

## **The current knowledge, skills and attributes of your learner**

Before you can develop a learning pathway to reach the relevant benchmark or standard, you will need to find out what your learner's current level of knowledge, skill and attributes is.

The organisation may already know this or you may need to be involved in finding this out. Ways that the current knowledge, skills and attributes of your learner can be determined include:

- undertaking a training needs analysis
- conducting a performance review
- identifying additional training needs of learners.

### **Undertaking a training needs analysis (TNA)**

A TNA is used by enterprises and industries to assist in developing or obtaining training and assessment which meets their needs.

Training needs analysis involves:

- identifying organisational/client needs through researching, gathering and organising information and data
- using reliable and valid data analysis methods to interpret the information
- providing advice and recommendations on training and assessment services required to meet the needs of the organisation.

A TNA can be done for a whole organisation, part of an organisation or an individual.

### **Snippet      Training Needs Analysis (TNA) in the building and construction industry**

I work for a private RTO. I was employed by a large construction company who wanted to establish a company-wide training program. They wanted to improve safety in the workplace. To find out what training was needed, we undertook a TNA. We developed a questionnaire for each worker to fill out. It included questions about what skills they already had—specific skills related to their construction job as well as more general skills like working in teams.

As lots of workers come from backgrounds where languages other than English are spoken, it was important to make sure that the questions were at the right language level. We gave the workers the option of responding to the questionnaire in written form or verbally. In some cases, responses were given in languages other than English. We also gathered information from performance review documents. Our goal was to find out what skills the workers had so we could determine what training was really required.

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Information about TNAs can be found in many sources.

A useful reference to begin with is:

Department of Employment, Education and Training, 1989, *Training needs analysis*, AGPS, Canberra.

## Performance reviews

Performance reviews involve analysing the performance of an individual against what is expected in the workplace. It is often part of a centrally controlled, structured process developed by an organisation. It is a source of information for identifying where work-based learning needs to occur to bring about changes in knowledge, skills and attributes to improve an individual's performance.

An example of how performance reviews are conducted is provided in the following case study.

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### Case study Grace explains her staff's work and learning plans

Alinka: 'So how do you find out what your staff need to learn on an on-going basis?'

Grace: 'My staff talk to my boss and me to develop learning plans. It's part of the annual performance management process. We ensure that individual work plans and learning plans are tied to the strategic goals of the organisation and department so that business objectives are met.

'The Human Resources department has created the relevant form: We use the staff's job descriptions along with information from awards and enterprise agreements as source documents to find out what knowledge, skills and attributes each staff member needs. Then it's a two-part process. The first part is about comparing last year's work plan with what was achieved during the year. Each staff member is required to assess their own performance. The second part is to move forward by developing the coming year's work plan. On the work plan, the individual provides details of the tasks and activities that they will undertake; the outcomes, expectations and timeframes, plus details of how each activity or task is related to the strategic plan of the organisation and department.

'They have to think about what knowledge, skills and attributes they need to successfully complete these tasks and activities. Where they think they need training to develop or enhance these, they also document this. It's the responsibility of the individual to research learning opportunities to fill any perceived gaps.

'The organisation offers a range of learning opportunities. We have an in-house library of online learning that includes modules for developing computer, generic and management skills. The organisation encourages on-the-job learning through projects, coaching, mentoring and feedback. That's the bit I am involved in for my staff. There is also off-the-job training. My staff might want to gain specialist knowledge by attending product briefings, equipment supplier training, conferences, seminars and workshops. Or they might want to gain a qualification or a statement of attainment through an RTO.

'Once all the documentation is filled in and learning opportunities are researched, the individual meets with me and my boss.

We work together to develop the final work plan and learning plan. We work through the previous year's work plan; what was and wasn't achieved in the past year impacts on both the work plan and the learning plan for the coming year. For example, key projects that haven't been completed may be included on the coming year's work plan. If goals have not been achieved, there may be a training recommendation put forward by me or my boss—for example, training in project management or time management if this is the appropriate level for the individual. I've had situations where a staff member has been ready for more challenging projects. We try to accommodate these too.

'Once we agree, the work plan and the learning plan are signed off. Then we implement them and use them as review documents in 12 months time. It's a good process.'

Alinka: 'So do you use these for your trainees?'

Grace: 'No, they have training plans. It's a different process—there are lots of other people are involved too; like the NAC and the RTO.'

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## Identifying additional learning needs for your learners

Learning needs can often be identified in a systematic and planned way by implementing systems for identifying skill needs such as TNAs or performance reviews as described above. However, sometimes things happen in a more ad hoc way. For example, something may come up that has not been planned for initially.

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### Snippet Additional learning needs

Erica was the new training consultant for an RTO and wanted to undertake a Training Needs Analysis (TNA) for the trainers and assessors. She spoke to her supervisor, Brenda about this. Brenda agreed on this direction and suggested that one of the administrative support people, Linda, be involved as part of her professional development. The three of them worked out that there were a couple of things that Linda should learn.

Firstly, she would need to know about TNAs. They decided that the best way to learn this was by reading about TNAs and discussing her reading with Erica. They would do this before Erica set up the TNA instruments, as Linda would then be able to have input into which instruments to use. They also decided that Linda would be involved in developing the presentation to staff about the TNA. This would give her an opportunity to apply what she had learnt.

Linda would also need to know how to set up a database to analyse the responses. She knew how to use a database, but she had never set one up.

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### Activity Determining learning needs

In what ways does your practice environment determine the goals of the work-based learning?

Who is involved?

Does this vary from one situation to another? If it does vary, explain why.

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### **Activity      Identifying the learning goals for your learners**

Identify a minimum of two examples where work-based learning is required in your practice environment.

Explain why the learning is required and provide details of how you found out about what learning is required.

Provide details of what your learners will be learning—is it knowledge, skills, attributes or a combination of these?

Explain why you think they need to learn these things. For example:

- how does it relate to the goals for learning?
- how does it relate to your learners' current level of knowledge, skills and attributes?

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## **Your learners**

You know your learners are learning in the workplace, so we can assume they are employed by your practice environment.

The learner could be:

- new to the practice environment. They may never have worked before, or they may have moved from one employer to another.
- people who have worked at the practice environment for a time. They may be experienced workers, but not in the particular job they are now doing.

The learner could be:

- an individual
- a group of people who may or may not be from the same work team.

Remember, when you are facilitating a group of learners, it may be necessary to develop work-based learning pathways for each individual.

What else do you need to know about your learners? And why do you need to know these things?

You need to know about your learners because it will impact on what learning strategies and approaches you propose. For example, if your learners are apprentices or trainees, you will have to find out what their learning plan is and make sure that what they learn in the workplace covers what is on that plan.

Depending on the profile or characteristics of your learners, you may need to provide or arrange support for them. For example, a learner may have a physical or intellectual disability and may ask you to provide appropriate resources to overcome or minimise physical barriers.

The activities or tasks that you choose to include in the learning pathway and how you communicate with your learners will depend on their language, literacy and numeracy (LLN) skills.



For further information about catering for learner differences, refer to the Learner Guides for *TAADEL401A Plan and organise group-based delivery*, *TAADEL402 Facilitate group-based learning* and *TAADEL403 Facilitate individual learning*.

As discussed in the previous Learning Topic, the effectiveness of the learning pathway may depend on how you cater for your learner's preferred learning style. If you know one of your learners prefers to learn by doing (such as working out for themselves how to use a computer application), it would be more effective to arrange activities that are practical, rather than have that particular learner read a workbook or manual. Of course, safety issues come into to play here, so don't always assume you can cater for your learner's preferred learning style!

You can find out about your learners by:

- communicating with them (either face-to-face, on the phone, via email, fax or letter)
- looking at enrolment information; employee/personnel records (confidentiality protected); the outcomes of Recognition of Prior Learning (RPL) assessments
- evaluating the results of training needs analyses.



Read the following part of Grace's case study and discuss how she has catered for individual learners and their needs.

### **Case Study Grace talks about catering for individual learners**

**Alinka:** 'You've set up learning pathways for so many trainees and for your own staff. Does it get boring?'

**Grace:** 'No, not at all. I have to remember that just because I've worked with one learner, I can't necessarily use the same approach for the next learner. Learners are all different and I have to cater for that.'

**Alinka:** 'What do you mean?'

**Grace:** 'Well, here are some examples.

'We had one trainee who was on medication to help her with an illness. The medication made her drowsy in the mornings, so she only worked a few afternoons a week. We changed how the material was 'chunked' so she didn't have to learn as much in one go. We also lengthened the duration of the assessment period to give her the opportunity to complete the tasks. All this added time to her traineeship, but that was OK.

'I understood that Indigenous people can have different ways of communicating and learning. But I never knew what that really meant, or how I should work with an Indigenous person. A year ago, Gretta, who is Indigenous, began working with us. Before Gretta started, I spoke to someone in the Human Resources department. They had some general information about Indigenous culture, but not a lot. Indigenous ways can vary from one community to another and I was told that getting in touch with someone from the local community would be the best way to find out about anything I needed to know. The woman in the HR department put me in touch with a respected member of the local Indigenous community. I had a talk to her—it was really helpful. When Gretta arrived, I asked her the same questions. She said she felt respected because I'd made an effort to learn about her culture.'

**Alinka:** 'Sounds challenging, but interesting. So once you work out how to cater for learners' differences because of their background, health situation or any other reason, is it all the same from there?'

**Grace:** 'No, not at all. I can't just assume that everyone will be able to learn in the same way. One learner might like reading user manuals, while others might not get anything out of that; they might like to be shown. When working out what approach I am going to take I have to take into account how someone will best learn something.



And you really have to know about each learner's current level of knowledge, skills and attributes. Some learners already know lots of things from previous jobs, or from school or somewhere else. If someone knows what a classification scheme is already because they used one in their previous job or learnt about them in the classroom at TAFE, then there is no point in them learning those things again. It would be a waste of time. The same goes for attributes. For example, I need particular staff to get to work at 8.30am to open the mail. If someone is a punctual person, then no problem. But if they're not, well we have to work out how they can become punctual so we can do the job in a timely way.'

**Alinka:** 'What about skills?'

**Grace:** 'Yep, same thing—don't expect everyone to be starting from the same point. Here's an example about language, literacy and numeracy skills. Staff in the records unit need to have adequate language skills to communicate with each other and with clients. They're doing things like opening letters and attaching them to files and classifying files, so they need to be able to read. They have to be able to write to leave notes for each other and fill in the forms. They have to have numeracy skills. So, during the pre-assessment activities, we find out about the individual's language, literacy and numeracy skills. The pre-assessment activities are specific to what they need to learn and do in their work, like take a phone message or read a letter and attach it to the correct file.'

Over the years, I've developed a bit of a 'grab bag' of pre-assessment activities that I choose from. From this, if necessary, we build in learning activities to develop these skills to the level required. We try really hard to incorporate these into the activities we do to develop other skills so that the learning is more meaningful. But this isn't always possible so, in these cases, we get others to do this part of the learning pathway.

When all this first started, we used to arrange funding for an external tutor. But now one of the new employees in the Human Resources department has language, literacy and numeracy teaching qualifications, so she does the tutoring. Like I said, I've learnt heaps doing this training part of my job.'

**Alinka:** 'Sounds like it!'

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What else do you need to know about your learners? Why do you need to know it?



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**Activity      Finding out about your learners**

Provide details of your learners, their profile and characteristics.

Are there any access and equity considerations that you will need to address?  
What are they?

Explain how you found this out.

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## 4 Developing the learning pathway

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At this stage, you have identified the goal of the learning and determined who your learners are. You can now start thinking about how you are going to facilitate work-based learning.

This involves thinking and making decisions about:

- what your learner will learn—what learning activities they will do
- how your learner will go about their learning
- where they will do the learning
- when they will undertake their learning.

You will need to think about:

- how areas of work may be affected by the introduction of work-based learning activities
- who you need to consult with and obtain agreement from about the purpose or objective of the learning and any proposed changes to work practices, routines or the work environment.

Once you find out about these things, you can develop a work-based learning pathway. This will involve:

- obtaining agreement from the relevant people for the implementation of the pathway
- proposing strategies that allow the organisation to support the learning
- arranging any necessary contractual requirements
- arranging for people who have responsibilities for learning to be involved
- where necessary, making connections with other organisations that may be providing external learning activities as part of the learning pathway.

## Criteria for developing a learning pathway

In developing the learning pathway, you will need to know how to evaluate your ideas. What criteria will you use to determine if your proposed work-based learning pathway will:

- be the best way to enable the learner to achieve the stated goals?
- be possible, given work routines, practices and the work environment?

In Learning Topic 1, you were introduced to the characteristics of an effective learning pathway. It's your job as a facilitator to develop your own pathway and, in the process, develop your own set of criteria by which you will judge its effectiveness.

Here are some ideas for criteria:

- Have you included a range of tasks and activities that will enable the learner to learn everything they need to achieve the benchmark?
- Will the learning program content be at the level of knowledge, skill or attributes that is required to achieve the benchmark?
- Will the tasks and activities address any underpinning knowledge required to achieve the unit of competency or benchmark?
- Will the sequence of tasks and activities chosen allow the learner to develop the knowledge, skills and attributes in a logical order?
- Have you included activities where the learner will be able to demonstrate that they can transfer what they have learnt to different contexts?
- Will the learning pathway foster individual responsibility for learning and self-reflection?
- Will the tasks and activities enable the learner to demonstrate autonomy in learning?
- Have you allowed enough time for learning?
- Is the sequence of activities arranged so that there is sufficient time for practice?
- Is what you are proposing possible given the operational demands of the job?
- Will the learning opportunities you are proposing put the learner or anyone else at risk?
- Do the learning opportunities you are proposing take into account any access and equity considerations?



Review this list of criteria. Is it helpful in thinking about developing a work-based learning pathway. Why or why not?

### **Activity      Developing a list of criteria for evaluating a work-based learning pathway**

While working through the rest of this Learning Topic, develop your own list of criteria for evaluating your proposed work-based learning pathway.

What would you add to your list and what would you take out? Explain why you have made these decisions.

Add your list to your resource kit.

Make sure you think about your criteria and apply them as you are working through the rest of this Learning Topic and developing the learning pathway.

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## **What will your learner be learning?**

Think about an area of work. What is it in that area of work that your learner/s need to learn so they acquire the knowledge, skills and attributes they need to achieve the set goals? Think of this as the '*what*' of learning.

'Area of work' doesn't mean a physical location, it means one of the following:

- a specific or discrete task or activity that is done as part of a job (for example, putting the hose safely on the fire truck)
- a set of integrated work tasks done as part of a job or a broad work function or role (for example, managing customer service)
- a work role requiring licensing (for example, a forklift operator)
- a work process involved in carrying out work (for example, undertaking assessment processes such as planning and organising assessment, developing assessment tools, conducting assessment or participating in assessment validation)
- how to use or operate equipment or technology to be able to do the work (for example how to use a knife, a hairdryer, a lathe, a till, a computer or a computer application)
- how to undertake project work
- how to do something they already do differently (for example, a different application of a work process with the introduction of e-based applications).

Remember, in any of these areas of work, you could be developing a pathway for a team or group of workers or for an individual.

### **Matching a work area with your learning need**

You are facilitating learning that is taking place on the job, as part of normal working routines, job role, tasks or activities. Given this, how can work be used as a learning environment so that the goals for learning are achieved?

As a starting point, think again about which areas of work relate to the goal of the learning and what the learner needs to learn to achieve this goal.

Analyse the area of work:

- What jobs, tasks, and activities are normally done? What are the steps involved in doing these? What knowledge, skills and attributes are required to do the job, task or activity?
- What routines and processes are normally followed? Look at the knowledge, skills and attributes required to do these.

How can you find this out?

Ask:

- people what they do
- people how they learnt it
- experienced or expert workers and/or people who have recently learnt
- what is the best sequence in which to learn how to do things
- if there were things that were hard to learn and how they learnt these things

Collate this information and make sure it's correct. For example, check that what *is* happening is the same as what *should be* happening according to the benchmarks.

Knowing this will help you develop a learning pathway. Don't forget to check that you have been told everything about what happens and what should be learnt. Don't forget those things that happen less often in the workplace, such as emergency procedures and other things that happen occasionally or annually. Don't forget to include things that only happen when it is quiet or when it is busy.

**Source:**

Adapted from Billett, S 2001, pp127- 132 and Appendix 1.

Your job is to work out whether it is feasible to use a particular area of work as part of your work-based learning pathway.

This snippet about the learning pathway for hairdressing provides an example of the areas of work that are used to teach an apprentice hairdresser.

### Snippet      Hairdressing

In general, hairdressers cut, colour and perm hair to meet client's needs. That's what they seem to do at work. But if you analyse this in more detail, the routine of a hairdressing salon involves more. The salon needs the right supplies. Someone is cleaning up. Someone might be bringing the clients a cup of tea or coffee. Someone is running the business—finances are involved, staff need to be paid. And while people are doing the 'hairdressing' part of the job, they are probably chatting to the client.

How does an apprentice hairdresser learn all these things? What knowledge, skills and attributes do each of these tasks involve? Which of these can be learned through work-based learning activities that are part of the normal work routine of an apprentice hairdresser?

Two attributes that a hairdresser needs are to be clean and hygienic. If it is part of the normal work routine of an apprentice hairdresser to sweep the floor and generally clean up, they will learn these attributes.

A skill a hairdresser needs is to communicate with the clients. By being responsible for bringing cups of tea or coffee to the clients, an apprentice hairdresser will begin to develop these skills.

Hairdressers also colour people's hair. To do this, they need to know how to mix hair colour products safely and to the right colour. They might learn the theory of this at hairdressing school, and then apply the knowledge they have learned at work under the supervision of a more senior, experienced hairdresser.

#### Source:

Adapted from Billett, S 2001, p.17.

Appropriate work areas may also be identified which are outside of the learner's normal work tasks but might provide good opportunities to meet the learning goals.



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<b>Activity</b>	<b>Determining the areas of work where learning will occur</b>
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Analyse areas of work in your practice environment to determine where learning activities might be able to occur for your learner/s.

How did you find this out?

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## How will the learner learn?

Having chosen the area of work in which your learner may be able to learn, how can you arrange for the learning to occur?

Learners could be guided by supervisors, more experienced workers, or experts. These people could demonstrate or model how to do tasks, activities and roles to the learner.

Learners could be given time to observe other workers doing tasks or activities. These other workers could model the right way to do things. They could also be given time to talk with other workers, a coach or a mentor. They could talk about what they are learning, the progress of their learning, the terminology of the workplace, the best way to do a task, or how to deal with something unexpected.

Learners could be given time to practice, with or without supervision. You may need to arrange for the learner to be rotated through various jobs or work processes. Learners could work on a project with others.

It might be most feasible to use a variety of these strategies.



Which strategies you use will depend on a number of factors:

- your learner—are they prepared to be involved? Are they motivated to learn?
- the availability and willingness of others to be involved—for example, an expert or experienced worker
- the response of other workers who will be affected by the implementation of the work-based learning pathway
- the support your organisation provides for work-based learning to occur:
  - the amount of support the organisation allows for the development and implementation of the workplace curriculum
  - the amount of time management allows for the learning to occur
  - how much they encourage participation by the learners and those who will guide them
  - how much time they allow for preparation of facilitators and briefing of learners
  - how change is managed.

Source: Billett, S 2001, pp.177-178 and Burns, R 2002, p.311.

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### **Activity      Learning strategies in your practice environment**

What do you know about the support provided for work-based learning in your practice environment?

What strategies are feasible or acceptable in your practice environment?

Find out and make some notes, or prepare a report or a presentation about this

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### **Snippet      Hands on—learning from an expert**

A new apprentice chef, Rebecca, is learning how to dice, slice and julienne vegetables without cutting herself. Chang, a qualified chef, shows Rebecca how to perform each of the cutting techniques—all the vegetables are cut perfectly and there is no waste.

But Rebecca is completely confused because Chang has used the knife too fast!

Chang then stops and explains that this is the standard to which Rebecca is expected to work in terms of speed and waste. For each technique, he shows Rebecca how to hold the vegetable firmly with her fingers curled in so they won't be cut. He explains how the knife needs to be slanted away from the fingers slightly as another measure to avoid cuts. He then demonstrates the techniques again, but this time much more slowly. He explains that Rebecca will only be able to cut vegetables as quickly as he does through practise—everyone knows that it will take time to be able to work at the required speed and there is time during the first part of the apprenticeship to practise.

Only then does Chang let Rebecca start, making sure her fingers and the knife are in the right position. He watches her for a while to make sure she is performing each technique correctly, then he leaves her alone to julienne carrots, dice potatoes and slice celery. Chang works nearby so that Rebecca can ask questions and he can see how she is going.

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What are the strategies Chang used?

What was good and bad about the strategies he chose to use?

What other strategies could Chang have used to teach Rebecca?

Do you think they would have been as effective? Why or why not?

## Activity Usefulness and limitations of learning strategies

Here is a summary of the usefulness and limitations of demonstrating/modelling and coaching strategies. Add your own thoughts about the usefulness and limitations of these strategies. Fill in the rest of the table for other strategies.

Strategy	Usefulness	Limitations
<b>Demonstrating/modelling</b> <i>An expert learner shows the learner how to do a work task</i>	<ul style="list-style-type: none"> <li>• good for hands-on tasks</li> <li>• allows learner to see the various sub-tasks, the order of things and to find out the expected level of performance (maybe by showing bad performances)</li> <li>• allows learner to find out about hard to know aspects of the task—especially if combined with discussion and questions</li> <li>• good for learners to establish rapport with the facilitator</li> <li>• modelling 'tricks of the trade' can help learn workplace procedures.</li> </ul>	<ul style="list-style-type: none"> <li>• time consuming</li> <li>• learner is passive</li> <li>• not useful for all knowledge, skills and attributes</li> <li>• might not be possible if learner and facilitator are in different locations or there are other barriers to learning (e.g. noise, safe gear etc)</li> <li>• 'expert' may not be prepared to be a facilitator.</li> </ul>
<b>Coaching</b> <i>Guidance of less experienced worker by more experienced worker</i>	<ul style="list-style-type: none"> <li>• Can show both good and bad performances</li> <li>• Use of tips and clues and feedback can allow learners to learn workplace procedures</li> <li>• Can be used to explain things that learner is unable to experience or understand</li> <li>• Builds the learner's confidence.</li> </ul>	<ul style="list-style-type: none"> <li>• Time consuming</li> <li>• Requires a good relationship between the learner and the coach</li> <li>• Distance can cause problems.</li> </ul>

STRATEGY	USEFULNESS	LIMITATIONS
Supervision		
Time to observe others at work		
Time to talk to others at work		
Practice		
Job rotation		

**Source:**

Adapted from Billett, S 2001, pp. 144-153 and pp. 156-157.



For each of the strategies described in the table above, provide an example of when it might be best used in a work-based learning pathway in your practice environment.

Think about:

- what your learners need to learn
- the area of work where learning will take place
- how the practice environment provides support for work-based learning.

Which of the strategies described in the table (for example, tutoring, modelling coaching) would work and which ones wouldn't work?

Which strategies would you use to ensure your learners learnt:

- evacuation and emergency procedures
- how to use machinery safety guards
- how to use the appropriate personal protective equipment
- how to operate equipment safely
- how to report an incident when safety has been breached.

## **Implications for work practices, routines and the work environment**

So far, you have thought about the areas of work, job tasks or activities to be included in the learning process and the strategies you could propose.

Are there any implications for work practices and routines and the work environment?

### **Schedules and timelines**

Regardless of the strategy used, one thing to think about is that the learner may be slow in their job in the first instance. It may be necessary to give the learner extra time to do their work so they can learn on the job. As the facilitator, you will need to find out if it is possible to fit the learning in with normal work schedules, timelines, routines or performance expectations. Or can these be changed to accommodate the learning?

### **Workplace procedures, routines and practices**

It may be necessary to change how the work is done to allow for learning to occur on the job. For example, to allow someone to start a new role that involves writing reports for a client, it may be practical to change the work process to include the step of having a supervisor or a more experienced worker check what the learner has produced before it is sent to the client.

### **OHS**

There may also be OHS factors to consider if learning is to occur on the job. Before it is safe to do the job or use a piece of equipment (or even practise), does the whole process of a particular role need to be known? Does the learner need to know all the OHS policies and procedures (and demonstrate they know them)? Would allowing a learner to do a job, even with supervision, put themselves or others at risk?

### **Industrial relations and demarcations**

Are there any concerns relating to an industrial situation that may arise because of on-the-job training.

People may have industrial relations concerns because of the involvement of employees whose job role or award does not include facilitating work-based learning. Are you proposing something that may result in a work demarcation dispute?

## Licensing and accreditation

In many industries, there are requirements to have a licence. Licences may be required for an individual to legally operate equipment. Licences are also given to organisations to provide a service; for example, providers of accredited aged care, childcare and services to people with disabilities. Such licences require the organisation to operate in a certain way and to certain standards. For example, it may be a requirement for an accredited aged care provider that a certain number of qualified staff are working on each shift. Therefore, arranging for a trainee to work on a shift as one of the rostered staff and be supervised may not be possible or may require extensive rearrangement.

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### Snippet      Replacing or repairing hydraulic hoses

In a large manufacturing firm, operators are required to replace or repair hydraulic hoses. The hoses are connected to a very expensive piece of equipment. If the work is not done properly, this machine can be damaged. James, the trainer, has found out that two operators, Magan and Scott, don't know how to do this, so Mark has arranged an on-the-job work-based learning activity.

James has spent a lot of time preparing the activity. He has developed a short slide presentation and a written handout. He has also collected a range of hose fittings, components, gauges and tools to complete the task. He has allowed approximately an hour to explain, demonstrate and individually instruct the operators in the process. He has allowed two further practice sessions of three hours duration where he can coach and mentor the team members toward achieving competency in this task.

Magan has read the machine manual and found out that the class and type of hose used on the machine must comply to the manufacturer's design specifications, which state that hoses must conform to Australian Standard 3791/1991. This standard states that all hoses will be fitted by qualified licensed hydraulic hose technicians. In other words, due to the fact that none of the team members are licensed hydraulic hose technicians, if something were to go wrong, the warranty on the \$27 million machine would be void. Therefore, the training James has set up is inappropriate.

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Discuss what James should have done before putting so much work into preparing this learning activity.

How could he have arranged this training to overcome the problem?

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### **Activity      Licensing requirements in your practice environment**

Are there any licensing requirements that need to be taken into account when considering on-the-job training opportunities in your practice environment?

What are they?

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Remember, it may be possible to propose changes to work practices, routines and the work environment to support more effective learning. If this is possible, you will need to obtain agreement to the proposed changes from the relevant personnel. This may be:

- the workplace supervisor or frontline manager
- training, human resources or industrial relations managers
- experienced or expert co-workers
- union representatives and/or delegates
- workers whose own jobs may be affected by the proposed changes.

It may seem too difficult or complicated to propose and implement a learning pathway that includes on-the-job activities that have implications for work practices, routines and the work environment. And it may be even more difficult to overcome these problems by going through the process of changing them to enable more effective on-the-job learning. But remember, one of the principles of adult learning is that *adults learn by doing* and *learning is more meaningful if it is based on real experiences*.

Developing a learning pathway that provides opportunities for on-the-job learning may be more effective than other strategies. Therefore, it may be well worth the time you and others spend considering and overcoming any negative implications that your proposals have for work practices, routines and the work environment.



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## Snippet      Changes to the work environment

Mark is training one of the production line team, Filipe, who is learning to change the seals on the glue nozzles. This needs to be done regularly, as the hot glue causes the seals to expand and break down, which causes the nozzle to leak, creating both a mess and an occupational hazard. In his role as facilitator, Mark is demonstrating the documented standard operational procedure involved in changing the seals. He first demonstrates the process to Filipe, explaining as he goes and answering Filipe's questions. His plan is to then coach Filipe and guide him through the process, making corrections and suggestions designed to enhance his knowledge, increase his comprehension and enable him to apply the skills that Mark has earlier demonstrated.

But there is a problem—Filipe is left-handed. Mark didn't know this. He thought he'd done all the right things in planning Filipe's learning pathway, but somehow this vital piece of information was missed. And it's a big problem. Because of the way the benches and the equipment are set up, it is not safe for a left-hander to do this job. Filipe can't get the nozzle at the right angle to avoid hot glue going everywhere. Mark has to stop the learning activity immediately. His next task will be to speak to the relevant people to see what can be done. Hopefully this can be resolved so Filipe can do this task safely.

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What might be some of the changes Mark would need to make to the work environment in the snippet above?

<b>Activity</b>	<b>Implications for work practices and routines</b>
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Find out if there are any implications for work practices, routines and the work environment that you need to take into account when considering work-based learning activities in your practice environment?

What are they?

How are you going to address these?

How feasible would it be in your practice environment to make changes to work practices, routines and the work environment to support more effective learning?

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## **Making connections with other organisations**

Other organisations may be involved in your learners' learning pathway. If this is the case, you will need to make connections with the relevant organisation.

For example, to achieve the learning goal, your learner may be undertaking external learning activities in addition to the on-the-job activities you are arranging with them.

External learning activities may be:

- external courses
- off-the-job components of an apprenticeship/traineeship
- equipment supplier training
- online learning provided by external training/assessment organisations
- conferences, seminars or workshops
- self-directed external learning.

External learning activities may be provided by:

- a TAFE college or institution
- a university
- a private training provider or group training company
- an equipment supplier
- a professional association
- an industry association
- a combination of these.

If your learner is undertaking any external learning activities as part of achieving the goal, you need to find out about these so you can work towards integrating this external learning into the pathway you are proposing.

This also applies to activities that are done in the workplace, but are not work-based, such as learning activities done in a training room.

The work-based learning pathway may be funded wholly or partly by a government funded training program such as the Workplace English Language and Literacy programme (WELL).

You may need to comply with the requirements of the other organisation. These may be practical considerations such as monitoring of learning activities or more formal assessment activities. You may have to comply with a contract or submit reports. Once you find out about these requirements and responsibilities, make sure you and your practice environment comply with them.

### **Apprenticeships/traineeships**

Some of your learners may be apprentices or trainees.

If this is the case, you need to be aware of the system for employing and training apprentices and trainees. You should find out about the following:

- the New Apprenticeship Scheme
- Training Contracts
- Group Training Companies (GTCs)
- the role of Registered Training Organisations (including requirements under the *AQTF Standards for RTOs*)
- pre training reviews
- training plans
- training records
- on-the-job or off-the-job training or a combination
- reporting requirements
- payments to RTOs
- issuing qualifications.

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## **Activity      Apprentices and trainees**

To find out more about New Apprenticeships, you can:

- speak to others in your practice environment
- look up the New Apprenticeships Training Information Service website
- look up the Group Training Australia website
- look up the relevant websites for your State or Territory training authority.

### **New Apprenticeships**

<<http://www.nacinfo.com.au>> accessed February 2005.

### **Group Training Australia**

<<http://www.gtaltld.com.au/>> accessed February 2005.

### **Australian Capital Territory**

Department of Education and Community Services—Training and Education Branch  
<<http://www.decs.act.gov.au/services/training.htm>> accessed February 2005.

### **New South Wales Department of Education and Training**

<<http://www.det.nsw.edu.au/trainingmarket>> accessed February 2005.

### **Northern Territory Department of Employment Education and Training**

<<http://www.apprenticeships.nt.gov.au>> accessed February 2005.

### **Queensland Department of Education and Training**

<<http://www.trainandemploy.qld.gov.au/>> accessed February 2005.

### **South Australian Department of Education and Training**

<[http://www.training.sa.gov.au/ovet\\_home.asp](http://www.training.sa.gov.au/ovet_home.asp)> accessed February 2005.

### **Tasmanian Office of Post-Compulsory Education and Training**

<<http://www.opcet.tas.gov.au>> accessed February 2005.

### **Victorian Office of Training and Tertiary Education**

<<http://www.otte.vic.gov.au/apprenticeships/newapps/index.htm>> accessed February 2005.

### **Western Australian Department of Education and Training**

<<http://www.training.wa.gov.au>> accessed February 2005.

## **Workplace English Language and Literacy (WELL) Programme and the National Reporting System (NRS)**

The goals of the work-based learning you are developing may include language, literacy or numeracy training and you may have been able to obtain external funding to provide this.

A source of funding for language, literacy and numeracy training in the workplace is the WELL programme. The main aim of the WELL programme is to provide workers with English language, literacy and numeracy skills. Funding is available for language and literacy training that is integrated with vocational training to enable workers to meet their current and future employment and training needs.

The rationale for the WELL programme is that all workers need adequate English language and literacy skills to make a full contribution to their workplace and to access mainstream workplace training. This is regardless of an employee's birthplace, gender or cultural, social and educational background.

The WELL programme is funded by the Australian Government, through the Department of Education, Science and Training.

The National Reporting System (NRS) provides a uniform, national framework for reporting on the language, literacy and numeracy outcomes of students. It is intended by DEST that the NRS will become the recognised standard used by educators and industry for reporting on competencies in literacy and numeracy. Providers involved in the WELL programme are now required to report on the language, literacy and numeracy outcomes of the program using the NRS.



More information about WELL can be found on the website of the Department of Education, Science and Training (DEST) at:

<<http://www.dest.gov.au/ty/well/>> accessed February 2005.

This website includes:

- guidelines on how to plan a WELL project and submit an application
- details of contractual and reporting requirements
- case studies of WELL projects.

Information about the NRS can be found at:

<<http://www.nrs.dest.gov.au/default.htm>> accessed February 2005.

## Putting it all together

How are you going to put what you have worked out so far into an effective work-based learning pathway for your learners?

You could begin to document your suggested learning pathway using a simple proforma like the one included in Appendix 1.

The following case study demonstrates how this might be applied.

### Case study Developing a learning pathway

A person newly employed in the coffee shop of a large hotel/restaurant complex is to be trained and a learning pathway has been planned using the proforma.

- The organisation is identified—Paris Hotels. The facilitator needs this information to find out about the organisation's policies and procedures, the strategies it uses to support work-based learning, and who else might be involved.
- The unit of competency is *THHBFB12B Prepare and serve espresso coffee*. This is one of the food and beverage units in the *THH02 Hospitality Training Package*. The purpose or objective of the learning comes from the unit of competency, which can be found on the National Training Information Service (NTIS) website: <<http://www.ntis.gov.au>> accessed February 2005.
- Some work has been done to map the areas of work and the recommended learning activity and strategy against the required elements, skills and knowledge for this unit of competency.
- There is information about the implications for work practices and routines and the work environment, along with some actions to take to address these. In one case, there might need to be a change to the roster to allow for the learning to occur safely and without affecting timeliness of service.
- Other learning activities are identified, as are other people who will be involved.
- Assessment requirements are identified. These include pre-assessment activities and formative and summative assessment activities. Pre-assessment activities include finding out if any other support is required, and what their learners' preferred learning style is.
- Depending on the organisation and the learning being proposed, the learning pathway documentation may also need to include information about timeframes, milestones and costs.
- At this point, the facilitator can determine the sequence of the learning activities. This will depend on what the learner needs to learn (that is, what knowledge and skills they don't already have) as determined in the pre-

assessment. Finding out about the external learning activities will also assist with the sequence, because the facilitator can work out when to undertake work-based learning activities in a logical and safe way.

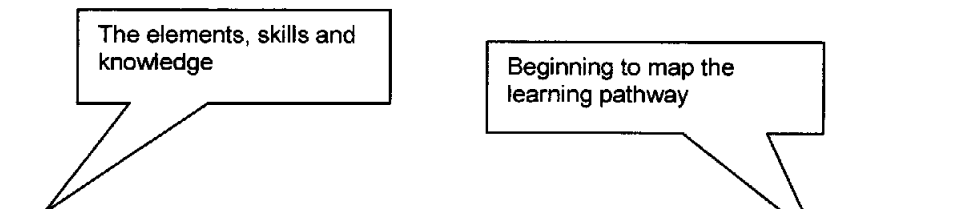
<b>Workplace</b>	Paris Hotels—roof top terrace coffee shop
<b>Name of employee</b>	
<b>Learning goal</b>	To extract and serve espresso coffee using a commercial espresso machine; including storage of coffee, and cleaning, care and preventative maintenance of machinery.
<b>Benchmark/Competency standard</b>	<b>THHFBFB12B Prepare and serve espresso coffee</b>

All staff who make coffee for Paris Hotels will be expected to have the following skills and knowledge.  
*The learning pathway below documents the learning activities, area of work and learning strategies that occur so that the skills and knowledge required will be gained by employees. Facilitators are expected to:*

- *customise the pathway (including the sequence of activities) to cater for each individual learner's needs and their current competency and/or prior learning*
- *monitor the learning to determine the individual's progress*
- *assess the individual to determine whether they are competent.*

Instructions to facilitators about how to develop and implement a learning pathway





Skills and knowledge	Area of work	Learning activity and recommended strategy	Learn Sequences
Comply with health regulations	Information session conducted by OHS Manager	Attend information session	
Knowledge of required equipment	Coffee making	Demonstration of equipment and discussion with experienced co-worker or supervisor	
Cleaning up equipment and work area	General	Observation of experienced worker, demonstration and discussion with experienced co-worker or supervisor, practice with supervision.	
How to use grinder	Coffee making	Observation of experienced worker, demonstration and discussion with experienced co-worker or supervisor, practice with supervision.	
How to use espresso machine	Coffee making	Observation of experienced worker, demonstration and discussion with experienced co-worker or supervisor, practice with supervision.	
How to froth milk according to type of coffee	Coffee making	Observation of experienced worker, demonstration and discussion with experienced co-worker or supervisor, practice with supervision.	
Provide customer service	Coffee making	Observation and listening, discussion with experienced co-worker or supervisor, practice under supervision.	

\* sequence to be determined once pre-assessment has been conducted and details of other learning activities have been established.

### Learning pathway—additional notes

Implications for work practices and routines have been identified and actions recommended

Implications for work routines and practices and the work environment (include actions required—including any proposals to change work routines and practices and the work environment to support more effective learning):

- timeliness of preparing customer orders may be affected while learning occurs.  
Action—arrange for learning to occur during quieter time—may impact on rostering (e.g. make sure experienced worker who has agreed to be involved in this learning activity is rostered on)
- OHS implications—e.g. very hot products involved  
Action—ensure learners are aware of OHS before practising themselves. Need to ensure all employees are aware of where nearest First Aid Kit is and that it is fully stocked at all times.

### Other people involved:

- co-workers
- supervisor
- OHS Manager
- Customer Service Manager.

Other people who will be involved in implementing the learning pathway

### Other learning activities:

External learning activities have been identified

- information session about company policy on customer service
- information session on OHS policy  
Action—ensure learner attends this session as soon as possible.

### Opportunities for transferring learning:

- what is learnt to clean work area and coffee making equipment can be used in all parts of complex where food is prepared (such as the sandwich bar)
- what is learnt in providing customer service can be used in all parts of job involving dealing with customers.

Opportunities for transferring the learning have been identified

Pre-assessment, formative assessment and summative assessment activities are identified

**Assessment requirements:**

- pre-assessment to determine existing level of knowledge and skills. For example, the person being expected to undertake this job role may:
  - already work for this company and therefore have knowledge of the company's policies and procedures in relation to OHS, hygiene and customer service
  - already have experience using an espresso machine and therefore have the skills to do this part of the job
  - already have experience in dealing with customers and therefore have the required skills and knowledge to do this part of the task.
- pre-assessment to determine language, literacy and numeracy levels
- formative assessment to monitor the progress of the learner while undertaking learning activities (*e.g. questioning learner and others; observing their work; sampling their work*)
- summative assessment to ensure the learner has the required skills and knowledge (*e.g. make coffee to the standard required in a timely fashion and meet food handling, hygiene and OHS requirements*).

**Support needs:**

To be determined during pre-assessment activities

### Timelines:

Depends on individual learner's progress

Details of support needs can be included once pre-assessment activities have occurred

**Costs:**

Depends on individual learner' s progress

Timelines and costs may need to be included

Even with a job that seems relatively simple, like making coffee, the process of developing a learning pathway requires a range of analytical, planning and organisational skills. In this case, the facilitator would probably have had to work with others and solve problems in developing the pathway.



An example of a learning and assessment plan for a person who is learning how to be a hairdresser can be found on page 14 of DETYA 2001, *Guide 6: Assessment approaches for small workplaces*, A guide to developing Training Package assessment materials. Information about how to access this booklet is provided in the Resources section of this Learner Guide.

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### Case Study How Grace puts together the learning pathway

**Alinka:** 'So how do you put a learning pathway together?'

**Grace:** 'Well, it varies. If I am developing a learning pathway for a trainee, I put it together with the people from TAFE and the NAC. The trainee has a formal training plan based on the qualification they want to gain and the units of competency that make up that qualification. We use the training plan as the basis for what they will be learning on the job. We talk about what the trainee learns in class at TAFE and work around this so that the activities we do at work build on what they do, or give the chance to practise what they do. We try to make the sequence of their learning logical. For example, I don't get a trainee doing a Certificate IV to be part of a project team who are develop a classification scheme in February if they are not doing that at TAFE until June. Of course, I could give them a lot of activities about what a classification scheme is, but then they'd be doing it twice.'

**Alinka:** 'Sorry, but what's a classification scheme?'

**Grace:** 'Oh sorry, it's a set of rules about how files are to be titled. You can use it for titling hardcopy files as well as electronic files, you know, your computer folders—even personal email folders. We use this to make the titles of hardcopy and electronic files consistent, so people can find things. It's what a good records management program should have according to the Standard for Records Management.'

**Alinka:** 'Oh, I think I need one of those. So tell me more about putting together these learning pathways.'

**Grace:** 'Well, for example, we couldn't expect someone to develop or review a classification scheme unless they knew what one was and also what each department does. There is no point calling a file 'Property—Leases' if your organisation doesn't manage leases. So the staff and the trainees need to know what each department does. I could tell them, or they could look at the business plans and annual reports. But we do it differently. We get staff and trainees, regardless of their level, to be involved in opening the department mail when they first arrive. Not only does it give them a chance to find out what every department does and meet other staff, it's also a chance to find out lots of information about the departments that couldn't imagine I could remember to tell them or keep up-to-date in documentation. Things like who has moved where in the department, or business activities that have changed. They get to learn about the way things work in our unit, too. So that's the first thing we do in the learning pathway. They won't muck up, because someone is there to answer questions and watch. And someone else is putting the letters on files, so if the new person has put the letter in the wrong pigeonhole, the mistake will be discovered and fixed before it becomes a problem.

After that, we build them up to more complicated duties depending on what their training plan requires and how they are going. Like I said earlier, this varies. Next, they might put letters on files according to how they've been classified by someone else. Then they might learn how to use the computerised records management system by watching someone. This will give them a chance to see how to register letters and attach them to the right file. After this they might be coached in classifying letters themselves.

It all progressively builds on their skills and knowledge and we use a variety of strategies to get them to where they need to be. I meet with them on a regular basis to check their progress. The amount of time this all takes varies... we pace it according to their progress. Eventually, depending on their level, we've got them doing all they need to do to gain their qualification.'

**Alinka:** 'So does that happen with your staff, too?'

**Grace:** 'Well the idea is the same—what do they need to learn? And how do they get there in a logical order? There might be an issue about motivation for staff. The trainees are more likely to be motivated to learn, although some of the higher level trainees don't like opening mail to start with. I agree with them, I didn't like doing it either, but if you explain why, they can see the point. But motivation is different with staff, especially if the reason you are developing a learning pathway is because you have identified that they are not very good at their job. This might cause some difficulties. We had one woman Janet, who knew how to do her job, but was really slow because she didn't have anything else to do other than classify letters.

It didn't take all day, but that's how long she took; she wouldn't take any initiative to do other things.

'Well in the end it worked out, because we all worked together to find out what we should be doing in our unit to comply with the Records Management standard and then worked out what we did and didn't do. We reorganised what we did and how we did it, and then there was time for Janet to do other things. That was the basis of her learning pathway. She got involved in the project to develop the new classification scheme. She was great. She knew everything about the department, so she was one of the 'expert co-workers' who worked with the trainee we had at the time. It all worked out really well. After a shaky start with Janet, she became a really good worker and ended up moving to a higher position in another department because of what she had done here.

'Another worker was less happy to help on that project because he said he wasn't paid to be a trainer and it wasn't in his job description to develop classification schemes. He even threatened to bring the union in. Fair enough, too, I suppose. We just have to work with that—although funnily enough, he was quite happy to share information informally with others working on the project!'

**Alinka:** 'Sounds complicated.'

**Grace:** 'It is, but I've got support from senior management and HR. As well as helping with the annual performance reviews, HR have developed lots of documentation. I really try to keep each individual involved—that helps. And in terms of work areas, it's pretty straightforward for me. I know what we do, so that is the basis of the pathway. It depends on the organisation's goals and how I can help to achieve those.'

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What are your thoughts about the various strategies Grace uses to put together learning pathways for her staff and her trainees?

What are the strategies? Are they useful to you? Why or why not?



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### **Activity      Develop a work-based learning pathway**

Investigate learning opportunities that will allow your learners to achieve their learning goals.

How did you go about investigating this?

Identify job tasks or activities to be included in the learning pathway.

Explain how these meet the established learning goals.

Explain why you are proposing a work-based learning pathway to achieve the learning goal. Why is this a better option than learning in another way (such as in a training room or via distance learning)?

Were there any work practices or routines in the work environment, that you needed to consider? What were these and how did you:

- identify them
- address them?

Put together a workplace learning pathway. What strategies are you proposing Explain why you have chosen these and not others.

What criteria did you use to determine if your proposed work-based learning pathway is:

- the best way to enable the learner to achieve the stated goal
- possible, given work routines, practices and the work environment?

Explain how and where you have:

- catered for the principles of adult learning
- catered for your learners' preferred learning styles
- addressed any access and equity considerations
- addressed any OHS considerations and other legislative and regulatory requirements.

Develop a plan for how you are going to explain the workplace learning pathway to the learner.

Explain how your learner's progress is going to be monitored.

Document who else will be involved in ensuring the learning goal is met:

- Who are they?
- How are they involved? (for example, external organisations, other work personnel affected by the work-based learning pathway).

Develop a plan for how you are going to:

- act on any requirements they have
- explain the workplace learning pathway to these personnel.

Reflect on the process of developing a work-based learning pathway.

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## Obtaining agreement to implement the pathway

Having developed a learning pathway, you will need to obtain agreement from the relevant personnel to implement it.

Remember, it may require all your problem-solving, communication and analytical skills to achieve agreement.



Who might the relevant personnel be to approve the learning pathway? In general? In your practice environment?



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### Activity Obtaining agreement for implementation

Find out who the relevant personnel are in your practice environment who could approve a learning pathway.

Obtain agreement from them.

Provide details of who the relevant personnel are and how you went about obtaining their agreement.



## Preparation for implementing the pathway, monitoring the learning and reviewing effectiveness

As part of your preparation for facilitating work-based learning, you should also think about how you will implement, monitor and review the learning pathway. You will need to think about the following questions:

- How are you going to monitor the learner to determine if they are ready to take on new tasks and responsibilities?
- How will you encourage learners to take responsibility for learning and to self-reflect?
- How are you going to provide opportunities for the learner to demonstrate autonomy in learning and to apply the knowledge and skills in different contexts?
- How are you going to monitor OHS requirements?
- How will you assess your learners?
- What methods will you use to give feedback?
- How will you maintain and store learner records?
- How are you going to review the effectiveness of the learning pathway?

These points will be addressed in detail in the next Learning Topics in this Learner Guide, but don't forget to think about them during the planning stage.

Some of these things could be incorporated into your list of criteria for evaluating the learning pathway you are developing.

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### Activity      What and how you will review

In your resource kit, document what you might include in your review. Think about ways that you will be able to find out these things.

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## 5 Implementing and monitoring work-based learning

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In this Learning Topic, you will be putting what you have planned into practice. That is, you will be having your learners do the activities, tasks and processes in the sequence agreed to in the pathway and putting the strategies into place.

This involves:

- making sure your learners know why the learning is occurring and what is going to happen
- making sure other work personnel who are affected by the work-based learning pathway know about what is happening and support the implementation
- monitoring the learning so that you know when learners are ready to take on new tasks and responsibilities; take responsibility for their own learning; and apply what they have learnt in other situations.

To achieve this, you will need to develop a collaborative relationship with the learner; observe work performances; suggest alternative approaches if necessary; and provide appropriate feedback. At the same time, you and your learners should take into account any OHS considerations and act on them if anyone is put at risk.

## Developing a collaborative learning relationship



What do you think a 'collaborative learning relationship' means?

Talk about this with others or write a list of words/phrases that explain what you think it means.

Try drawing a picture of a collaborative learning relationship. What does it look like?

Does it vary when there is more than one learner?

Does collaborative learning look different if learning is happening in a classroom or training room? How and why?

A collaborative learning relationship doesn't just happen. It takes commitment from both the learner and the facilitator to create one. Your objective is to develop and maintain rapport with your learner.

One of the first things you can do is make sure your learner knows about the learning pathway. As emphasised in the previous Learning Topic, you should have involved your learner in the planning stage so they know what is going to happen (the learning pathway) and why it is going to happen (the learning goal).

Your learner should also have been involved in developing the sequence in which the learning is going to happen, that is, the details of the learning pathway.

Without knowing why the work-based learning is occurring, the learner may not be prepared to participate. This may especially be the case if a learner believes the goals for the learning are for the benefit of the employer or organisation, and not the learner themselves.

Make sure, as much as possible, that you keep to the sequence of the learning pathway during implementation. You have spent time developing a sequence that is logical—where one task or activity builds on the skills and knowledge learnt in previous tasks or activities. By keeping to the agreed sequence, the learner will know what is going on and will be able to see that they are learning in a logical, incremental way.

Of course, things may happen that were not known about during the planning stage or could not be expected. This may require you to change the pathway in some way. Continually keeping the learner informed during the implementation stage, including when changes need to occur, will help to foster trust—an important part of a collaborative learning relationship.

Your relationship with your learner will also be affected where other work personnel are involved in the implementation of the work-based learning pathway. Therefore, you need to consider the relationships that you and your learners have with these people.

Remember, people react differently to change. Some people may respond positively and enthusiastically—they may be happy to be involved and change their own work situation to accommodate your learner. Others may be less keen and may react negatively to the learning pathway.

One strategy you can use to encourage a more positive reaction to change is to keep people informed and include them in the decision-making process as much as possible. In the planning stage, you should have made sure other workers who are affected by the work-based learning pathway were informed and consulted.

If these other stakeholders are not informed, the implementation of the pathway may be affected. For example, experienced or expert workers may be involved in sharing information with your learner. If they are not informed of what is happening and why it is happening, they may be less keen to share their expertise or experience. More seriously, they may even try to negatively affect progress by providing wrong or incomplete information.

Alternatively, other people may be indirectly affected by the work-based learning pathway. Once again, unless these people are kept informed, they may have a negative attitude to the learning being implemented, and the learner. In turn, any negative impacts on the implementation may negatively affect the relationship you have with your learner.



What would you do if you had a learner who did not want to participate in the work-based learning pathway?

What would you do if the successful implementation of your proposed work-based learning pathway depended on the involvement of an experienced worker, but they were not prepared to be involved?

## Using appropriate interpersonal and communication skills

A collaborative learning relationship very much depends on the interpersonal and communication skills you use during the relationship. These are also important skills to use when developing and maintaining rapport, monitoring the learning, providing feedback and addressing any barriers to learning.

Communication is one of most obvious and, at the same time, most difficult aspects of our lives. We tend to think of communication as having a conversation with another person, that is, the actual words that are said. However, there is much more to communicating than this.

As a facilitator, you should communicate clearly and effectively, speaking clearly and slowly enough for learners to follow easily. Unfortunately, some facilitators tend to speak very quickly when they are nervous and this can make it very difficult for learners to follow. Remember to stop and take a breath before you speak; it really does make an amazing difference.

A facilitator needs to demonstrate an open communication style which models appropriate behaviour. It is important for facilitators to model a flexible approach which is sensitive to culture, ethics and gender.

For now, we are interested in the ways in which facilitators build relationships. Here, we are talking about the relationships between you and your learner as well as the relationships the learners build with each other. As we know, adults bring a wealth of life experience to the learning situation. Much of what learners learn throughout the work-based learning pathway will come from their sharing of ideas and information. It is therefore really important to start to foster those relationships as early as possible.

Facilitators use a range of communication and interpersonal skills to support the building of positive relationships. This may involve using the terminology and language of the industry/profession and ensuring that the language, literacy and numeracy used is appropriate to the learners.

When communicating with your learner:

- Make sure your learner can understand the words you are using. The same applies for anything you provide in written form and in any situation where your learner needs to understand or use numbers. But make sure you are not patronising your learners by making your words too simple! It can be a fine line. You will have found out about your learner's language, literacy and numeracy (LLN) skills during the planning phase. You should have used this information to develop a learning pathway that is at the right LLN levels for your learner, and allows them to extend these LLN skills where necessary. Now you are using this information as part of the process of developing and maintaining a collaborative learning relationship.
- Make sure that that any technical language you use is right for the level of training and the area of work. Remember, the level of the technical language used can vary in one area of work. For example, in Grace's work, she could use the terms 'titling rules', 'classification' and 'taxonomy' to describe the same thing. Don't confuse your learner by using the wrong level of technical terms. But, at the same time, remember that technical terms should not be avoided – they are important and necessary.
- Allow learners to have their say. This is a particularly useful way to find out about the learners' past experience with any topic that comes up during the learning pathway.
- When responding to learners' contributions, listen actively and critically, show empathy, and remain open to opinions and ideas expressed. Facilitators also need to respond honestly and appropriately to questions asked by a learner. It is absolutely alright for a facilitator to say they do not know the answer to a question. You can then undertake to find out the information or suggest that learners follow up for themselves. It is much better to say you don't know than to give an incorrect answer.



What kind of behaviours might you expect to observe with a new learner?

How would you ensure the individuals present are made to feel comfortable and welcome?

If you are facilitating a group of learners, what steps would you take to support people in meeting each other, and why?

How will you start to establish trust and rapport with the learners?

## Strategies for developing collaborative relationship:

The following are some strategies you may use to develop a collaborative relationship with your learners.

### Icebreakers

If you are facilitating a group of learners and they don't know each other, you may consider using an 'icebreaker'.

Icebreakers are designed to support individuals in a group to establish relationships with other group members. Facilitators often use icebreakers at the beginning of a session to encourage people to mix together and get to know each other. This may be useful in a work-based learning pathway.

Learners have mixed responses to icebreakers. Some learning styles find icebreakers particularly challenging and, depending on the activity chosen, can find them quite embarrassing. Other learners are more than happy to participate and become actively involved in an activity, even if it seems unrelated to the subject matter.

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### Activity Icebreakers

Search out a range of icebreaker activities and identify a number of activities which could be appropriate in your practice environment. There are numerous books on trainers' games and icebreakers; you can also access hundreds of activities via the Internet. The following sites are just the beginning:

- Ice Breakers—Seattle Community Network  
<<http://www.scn.org/ip/cds/cmp/modules/tm-ice.htm>> accessed February 2005.
  - Building Dynamic Groups—Ohio State University  
<[http://www.ag.ohio-state.edu/~bdg/ice\\_breakers.html](http://www.ag.ohio-state.edu/~bdg/ice_breakers.html)> accessed February 2005.
  - Ice Breakers—Little Falls Christian Centre  
<<http://www.littlefallsonline.com/icebreakers.cfm?iceID=12>> accessed February 2005.
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## Questioning techniques

No matter which strategy is used (coaching or mentoring; modelling/ demonstration; observing others; or talking to others), it is likely that questions will be asked, by both the facilitator and the learner.

There tends to be a mistaken notion that facilitating learning is equivalent to giving advice. While giving advice has its own uses, the more difficult skill is asking the right questions. Asking questions allows you to facilitate your learner's growth. In many instances, the best sources of information are the learners themselves.

As a facilitator of work-based learning, you will question your learner to find out:

- if the pathway suggested is enabling your learner to learn
- if the learner is ready to take on new tasks and responsibilities
- if your learner is able to transfer the skills and knowledge they are learning to different contexts.

The answers to questions may be given in writing or verbally. If answered verbally, it is necessary to use listening skills so that you fully capture the information given to you – taking notes may be appropriate.

Maintaining a rapport with the learner is essential to ensure a fair and just relationship is maintained. A good understanding of the basics of questioning helps in devising questions that generate an appropriate response. Preparing questions beforehand is good practice.

There is a skill to asking the right questions in an appropriate manner. Bad questioning can create undue pressure, and embarrassing questions can lead to defensive and negative responses. This will not foster a rapport or create a positive environment.

Questioning is not a natural skill and often the facilitator assumes or is elevated by the learner to the role of 'expert' and falls into a 'tell' approach to learning. Accepting information, statements, or propositions is passive. To learn and internalise the learning requires active questioning.



## Closed and open-ended questions

Questions are phrased as either closed or open-ended.

Closed questions are used when a 'yes' or 'no' or a short answer is enough.

For example:

- When is the meeting?
- Has there been a situation where supplies have run out?

These are mainly used to verify information or to confirm agreement or commitment.

Open-ended questions are used to explore opinions, encourage feedback and establish rapport. Open-ended questions are useful when the learner needs to give complex information and explanations. An open-ended question is broad in its scope. Often, you just give the learner the topic to be covered.

For example:

- What actions have you used to establish relationships with key people?
- How have you approached contacting key people in the organisation?

## Ways to use questions



More information on questioning techniques, particularly more details on ways to use questions, can be found on pages 168–174 of *The Coaching at Work Toolkit: A Complete Guide to Techniques and Practices* by Perry Zeus and Suzanne Skiffington. Full details of this resource are listed in the Resources section of this guide.

More information about questioning techniques can also be found in the Learner Guide for TAADEL402A Facilitate group-based learning.

Questions can be:

- *How* questions—how did you feel? How does that fit in? How would you apply that?
- *What* questions—what happened? What was important about what happened? What makes you think that?
- *When* questions—when will that happen? When do you have to...?
- *Where* questions—where did it start to go wrong? Where does it happen?
- *Why* questions—why did you do that? Why do you think that happened?

Exercise caution when asking *why* questions. Although *why* is a good first word to shape open-ended questions, it often carries a more judgmental tone.

*Why* questions can have an accusatory or critical tone that may put the learner on the defensive rather than inviting them to speak freely. Therefore, either manage your tone carefully so as to sound inquisitive, or rephrase the question. For example, instead of asking 'Why did you do that?', you could say 'Can you explain your thinking on the handling of that piece of equipment?'

You can ask:

- *clarifying* questions: 'did I understand you to mean....?'
- *elaborating* questions: 'could you say a little more about that?'
- *challenging* questions: 'what makes you think that?'
- *confronting* questions: 'you claim you... but you'.

You can use questions to make sure the learner has understood your advice or instructions.

Posing a hypothetical question to your learner can be useful to find out how they would go about dealing with a particular issue. They usually start off with 'what if ...' or 'if Person A were to do this action, what would you do?' Only ask a hypothetical question if you are sure it is reasonable to expect the learner to have sufficient knowledge and experience to be able to formulate an answer. Such questions also enable the learner to demonstrate that they can think their way through the issues.

- You can use questions to show your respect of your learner, for example, 'tell me about your strengths so we can make sure we use these during the learning pathway.'

It is important to make sure the relationship stays positive. Asking questions which show respect of your learner can help this, as can questions that encourage the learner to show you they have been able to solve problems. For example: 'how did you go about fixing...?'.

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Ask reflective questions to build rapport and empathy. Summarise and mirror back the learner's point in the form of a question so that they can realistically re-examine it. Be careful not to simply parrot or to imply any judgement. The fact that you don't resist and are not immediately evaluative creates rapport, increases trust, encourages further expression and often leads the learner to modify their opinion or to simply confirm that you are correct in your understanding.

In an effort to overcome the learners' objections to a suggestion, less skilled facilitators often make the mistake of trying to bluff their way through by making statements of opinion, snowballing with facts, telling the learner that they are wrong, making threats, or asking leading questions that put the learner on the defensive. Less skilled facilitators may be fearful of discussing the situation and may neglect to take into account the learner's viewpoint or to recognise their needs.

A more useful approach is to open up the discussion to reveal fully any stumbling blocks and then to locate and build up the areas of agreement.

### **When to use questions**

You can ask questions at all stages of a learning relationship. At certain times during the relationship, the purpose of the questions may be very specific. This includes:

- during formative and/or summative assessment, for example, 'what are the OHS considerations when using this particular machine?'
- to evaluate the progress of the learning and the learning relationship, for example, 'are we progressing at the right rate for you or would you like to go slower or faster?'
- during the final stages of the learning relationship/pathway, for example, 'what has been most useful to you?'

#### **Source:**

*Zeus, P & Skiffington, S 2000, pp. 172–173.*



## **Activity      Preparing appropriate questions**

Select a topic that you can have a conversation about.

Have the conversation and try to find out as much as you can from the other person by using open-ended questions and probing for more information. Ask someone to observe your conversation and to give you feedback on your questioning technique. You might even record your conversation to enable you to review your own questioning technique (but make sure you have permission from the other person!).

Practise again, this time selecting a topic for a conversation with your learner about something they are learning, have learned, or are going to learn.

What type of questions will help you to elicit information about your learner's progress?

Think about what kind of information you are seeking, and develop your questions accordingly.

Practise these with others or with your learner.

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## **Non-verbal communication**

Non-verbal communication can have an effect on the relationship between you and your learner.

For example, when asking questions, the use of non-verbal responses can be important. To pause after a question is answered may indicate to the learner to elaborate on what they have said. However, to remain silent too long might be perceived as threatening. You can encourage the learner to continue to speak by leaning forward, adopting a body position that indicates interest and responding positively with favourable noises, such as ('Uh-uh', 'Mmmm', 'yes', 'OK'). A simple nod may also be encouraging.

Generally, how we say something may have as much impact as what we say.

Non-verbal signals include:

- how we sit—this includes whether we are fidgeting, whether we have an open posture (or whether the posture is too open and therefore confrontational)
- how we stand—we often say that a person who crosses their arms is putting up a barrier between themselves and the other person, and may therefore be uncomfortable with that person
- our facial expressions—do we look happy, interested, nervous, annoyed?
- eye contact—is the eye contact we have with others culturally respectful?
- physical space—are we providing others with appropriate physical space for them to feel comfortable?
- vocal tone—the tone of voice you use with your learner needs to be non-judgmental and inquisitive. This means inviting the learner to feel comfortable expressing thoughts, providing information and exploring issues on a deeper level.

Body language is the unspoken communication that goes on in every face-to-face encounter with another human being. It tells you someone's true feelings towards you and how well your words are being received.

Your ability to read and understand your learner's body language, as well as control the message that you transmit through your own body language, can mean the difference between making a great impression or a very bad one! We communicate a great deal about how we feel by facial expressions, tone of voice, eye contact, pauses, hand movements and body postures.

Remember, how non-verbal signals are interpreted may vary from one person to another. This may depend, among other things, on age, background or gender. For example, in Australian society, reasonably consistent eye contact is a sign of interest in, and acknowledgement of, the person and the interaction. Other cultures teach that it is respectful to lower the eyes when being spoken to particularly if the speaker is in a position of authority. You should ensure that the body language you use with your learner creates a feeling of comfortable rapport. If your learner is from a culture different to your own, take the time to find out any cultural variations.

Remember that the non-verbal signals may change as the relationship develops. They may also be different depending on how things are going in the relationship or in the learning pathway.

Finally, remember that interpreting one gesture in isolation is a mistake. You should look for 'clusters' of gestures, and note the context in which the body language is used.



What forms of non-verbal communication can you think of that have a particular meaning to you?

How do you cater for different reactions to non-verbal signals? What do you think is the cause of these different reactions?



Zeus, P & Skiffington, S 2000, *The Coaching at Work Toolkit. A Complete Guide to Techniques and Practice*, Chapter 12, 'Non-Verbal Communication.'

### Listening

Listening is an important skill to develop as a facilitator. Few of us really actively listen to what another person is saying. More often, we hear only part of what another person has said and then begin to form our own response, counter-argument or rebuttal. Frequently, we hear and respond to the words, but not the feelings that the other person has communicated.

Actively listening or improving listening behaviour requires the ability to:

- concentrate
- apply objectivity
- employ questioning
- obtain feedback.

Without the ability to listen, the questions may become obsolete. You must be able to listen to obtain the information you require otherwise you are only doing half the job.

Active listening restates or mirrors to the speaker both the reflective feeling and the content of the message. It shows the other person that you understand.

You can use paraphrasing to achieve accurate understanding of the content. Paraphrasing is useful at work to confirm instructions or information before you take action.

A quiet environment with minimal distractions fosters effective listening. This may not be possible in some work-based learning situations.



What would you do if you were facilitating in a noisy workplace or a place where you were both wearing so much protective clothing (goggles, helmets etc) that it was not possible to communicate?

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### **Activity      Are you an active listener?**

Study the characteristics of effective and ineffective listeners.

Note the verbal and non-verbal signals they give you to indicate whether or no they are actively listening to your words and taking note of the feelings behind them.

Select the listening habits that you think you would like to employ and concentrate on using these in your interactions with others, both at work and socially.

Note any differences that your active listening practice makes to your interactions with others.

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## **Providing opportunities for practice**

Learning something new can require a bit of time. Think about your own progress through this Learner Guide. Have you magically become an effective work-based learning facilitator just by reading this Learner Guide? It would be most unusual if you had.

Learning requires time for integration and practice. If, as you have worked through these notes, you have engaged fully with the materials, by now you would be starting to develop some of the competencies required. However, you may still need more practice in actually facilitating learning. Without practice, the required competencies do not develop.

Practice needs to be provided when learning knowledge as well as skills. By making sure you spend time observing and monitoring the learner's practice exercises, you can monitor how well your learner is progressing with their learning.

Whether learning new knowledge or a new skill, it is essential for your learner to be able to practise. You should have built opportunities for practice into the learning pathway, including opportunities to practise what has been learned elsewhere (in the training room, at the RTO or their own self-directed learning).

Providing opportunities for practice allows learners to demonstrate their learning, make mistakes and gain confidence in their new skill or knowledge. A successful facilitator creates an environment in which it is safe to try out new things. It is imperative for learners to know that it is safe to try – that they are not expected to be perfect yet. After all, they are only learning and you can't expect a beginner to have the same proficiency as an experienced worker.

Some learners, however, have very high expectations for themselves; they do not like making mistakes. By reminding your learner that it is just a practice session and mistakes are okay, you can reduce some of their stress.



How much practice learners need is a judgement that you will have to make in consultation with them. When planning the pathway, think about when you anticipate learners will achieve competence. You can sometimes arrange for learners to practise at other times. Some learners will require longer practice periods than others.

The time people take to learn will depend on their understanding of the task requirements, their previous experience, their self-concept and many other factors.

Ensuring that learners have adequate and appropriate opportunities to practise what they have just learned will improve their retention of the new information or skills. By including adequate practice time when develop a learning pathway, you will be able to ensure that the practice your learners have will contribute to achievement of the learning goal.

### **Practising new information**

Just like practising a new skill, learners need to practise applying new information. The best way to get learners to practise this is to include appropriate learning activities in the learning pathway.

By sequencing the activities in a logical order, your learner will encounter new information as they progress along the pathway. You should allow your learner time to practise applying their new information, and prepare your questions to provide them with opportunities to demonstrate this.

### **Practising a skill**

Learners will learn a new skill more effectively if they are provided with the opportunity to practise.

Don't forget to think about any OHS issues that may arise in presenting your skill-based session. In relaying guidance and instructions to your learners about OHS, provide it in a positive, not a negative way. Too much negativity can discourage a learner.

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### **Activity      Using DEDICT**

Use the practice phase in the DEDICT model you learnt about in Learning Topic 2 to facilitate a skills-based training session with your learner.

Was the model useful and effective for you? Why or why not?

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When getting learners to practise new knowledge and skills, it is essential that you give clear instructions. Activity sheets are helpful as they reinforce the verbal instructions you give to your learner. Alternatively, you can write down the key requirements of the activity on the whiteboard. Using these strategies means learners can check that they understand the requirements and it can also help them stay on track during the activity.

Setting time frames for activities is another way of supporting learners to stay focused and use time effectively.

Whichever learning activity you choose, make sure that your learners can see the relevance of what they are doing.

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### **Activity      Providing opportunities for practice**

Practise facilitating part of your learning pathway—a part where your learner is learning a new skill and/or some new knowledge. Obtain feedback from others about how you provided opportunities for practice. For example, what activities did they observe you doing? Did they think your instructions were clear? What sort of questions did you ask? Did your observers think the opportunities for practice were effective?

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## Monitoring learner progress

The reason for monitoring learner progress is to ensure that, at the end of the learning pathway, your learner has achieved the stated learning goals.

But monitoring learner progress is not just something done at the end of the learning pathway.

During the learning pathway, the learner's progress can be monitored to determine many things:

- if your learner is ready to take on new tasks and responsibilities
- if alternative approaches are needed
- if your learner is able to transfer their learning to different contexts
- how effective the work-based learning pathway is.



Think about some of the ways in which you might monitor your learners' progress.

What might alert you to the fact that learners were not making progress?

What actions could you take if learners were not making sufficient progress?

## Providing feedback

One of the ways to ensure learning goals are achieved is to provide your learners with feedback about work performance. Make sure you provide feedback about their successes to keep them motivated!

Feedback can be given:

- formally during a performance review or formal group or individual discussions
- informally, through discussion with a group or an individual.

While most of us recognise that feedback is important and helps us to learn, many people find it very difficult to provide feedback.

In the case of positive feedback, it is often given too generally. The result of this is that the recipient might perceive it as somewhat meaningless. Another risk with generalised feedback is that the person receiving it may wonder if you have really taken the time to observe all of what they have done or written.

There are lots of challenges in providing constructive feedback, or highlighting areas for improvement. Some people just want to be 'nice'; they don't want to upset the person. However, you should think about how upset the learner will be if they have been practising something the wrong way and you have not let them know or suggested ways to improve their performance.

Regardless of whether the feedback is provided formally or informally, you may find it useful to use a structured feedback model. Using a model can provide a sense of security. Good models for feedback remove the focus from the person and direct it to the behaviour or action. This ensures that feedback is not personal and reduces the risk of it being seen as an attack of any kind.

There are many models of providing feedback. Three examples are given here. Practise using each of them so that you can vary them to suit the circumstances or situations you encounter. Your feedback also appears more genuine and real when you provide it in ways which suit the people and circumstances concerned.

### Model 1—the feedback sandwich

The feedback sandwich is a commonly used model for providing feedback.

<b>Positive</b>	Begin the feedback by identifying something the person has done well.
<b>Constructive</b>	Then address the areas for improvement, sometimes known as criticisms.
<b>Positive</b>	Finish on a positive note, highlighting the greatest achievement.

**Source:**

Kaprielian, VS and Gradison, M 'Effective Use of Feedback' *Fam Med* 1998; 30 (6): 406-7.

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#### **Snippet      The feedback sandwich**

Your vocal tone throughout the meeting this morning was very clear and welcoming, and you included everyone in your eye contact. Try to make sure you have everyone's attention when you are making an important point. When you were going over the benefits of your idea, I noticed that Paul and John didn't seem to be listening. I liked the way you asked for questions at the end of your presentation, and gave everyone an opportunity to speak.

This model may be a useful starting place but it is not always the most appropriate. We remember best what we hear first and last, sometimes forgetting what was in the middle. If the middle was the real message that you wanted the person to take away, it may be missed. Furthermore, if you always use this model for feedback, every time you say something positive your learners may become conditioned to look for the negative. Such reaction is not conducive to a positive learning experience.

## Model 2—AID for Feedback

<b>Actions</b>	What the person is doing well or poorly
<b>Impacts</b>	What the effect of these actions is on themselves or other people
<b>Desired outcome</b>	Identify ways in which things could be done more effectively in the future

### Source:

Landsberg, M. (1997), *The Tao of Coaching*, Harper Collins Business, London.

This is a simple and effective model to use. It works equally well for positive and constructive feedback. Here are two examples:

- Are you aware that when you were showing us how to use that piece of equipment, not all of us could see properly? Next time when you do this, check that everyone can see before starting.
- When you provided an overview of the process that we were about to learn, it put it all into context. Keep it up. This is an example of good facilitation practice. Well done.

## Model 3—the 4-stage feedback process

<b>Stage 1</b>	<b>Describe current behaviours</b> Describe current behaviours that you want to reinforce (praise) or redirect (criticism) to improve a situation.
<b>Stage 2</b>	<b>Identify situations</b> Identify the specific situation/s and contexts in which you observed these behaviours.
<b>Stage 3</b>	<b>Describe impacts and consequences</b> Describe the impacts and consequences of the current behaviours, both in terms of the individual and others if appropriate.
<b>Stage 4</b>	<b>Identify alternative behaviours</b> Identify alternative behaviours and actions for the future.

### Source:

Jerome, PJ (1995), *Coaching Through Effective Feedback*, Kogan Page, London.

This process is very similar to the one offered by Max Landsberg—the difference is in identifying the context in which the behaviour occurs. This is particularly useful when someone generally acts in one way, yet in a different context or with a different person, they act in a very different manner.

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### **Snippet      Presentation**

John's learner, Aisha, gave a presentation at a management meeting where John was also present. Due to nerves, Aisha spoke very quickly, so that some of the meaning behind her presentation was lost. Rather than simply telling Aisha that she had spoken too quickly (negative feedback), John pointed out exactly which parts of the presentation had been delivered too quickly, and the effect that this had had on the audience. John then suggested some strategies for overcoming nerves in front of a group and together they developed some learning activities. Aisha was an activist, so the activities involved lots of practice speaking in front of groups.



Which model of feedback would work best for you and your learners? Why?

### **Learners reviewing their own progress**

Providing constructive feedback to your learners is important for their continual progress. However, it is also important to encourage your learners to review their own progress. There are various ways that they can do this, including:

- obtaining feedback from their work colleagues about particular aspects of their performance
- obtaining feedback from their fellow learners about their performance of various tasks
- seeking feedback from their workplace supervisor or manager
- obtaining one-to-one feedback from you, as their facilitator
- keeping a journal where they can document aspects of their progress; reflections on their progress; areas they think they could improve on; areas on which they need further support; and areas they have understood completely
- encouraging them to prepare their own learning plans and set their own personal goals, which enables them to work towards achieving the assessment activities and tasks of the learning pathway.

## Encouraging reflection

One of a facilitator's goals is to encourage learners to direct their own learning as much as possible. To do this, it is important that the learner focuses on their capacity to self-reflect. While facilitators can provide feedback, they are not always going to be present to do this. It is far more beneficial to encourage people to self-reflect and provide themselves with valuable feedback.

Reflection is a critical part of learning. It is often when we take time to reflect on our actions and their consequences that we can identify better ways of doing things. Reflection also allows us to consider how we would apply a skill in a new context or how else we might handle a situation. Reflection encourages us to learn from our experience and integrate new learning into future actions.

Providing structured, task-specific feedback sheets for people to use to reflect on their performance is a useful aid for self-reflection. Some questions that you could include are:

- Reflect on your own ability at this work task, activity or process:
  - what do you think you are you good at or have learnt thoroughly?
  - what do you think you need to practise more or learn more?
  - how do you think you can improve?
  - how do you think your facilitator can assist you?
  - do you think others can assist?
  - who do you think these people are?
  - how do you know when you can do something?
  - how do you know when you can understand something?



What other questions could you include on a feedback sheet to encourage your learner to self-reflect?

If you are facilitating a group, you can encourage self-monitoring and reflection by having a small group of your learners review the work of other groups, again guiding this by supplying a list of key points to look for.

Reflection like this is useful as it provides an opportunity to learn from mistakes and to foster positive learning relationships within the group. It also supports the individual learner in becoming more autonomous.



## Changing your approach

Your learning pathway is like a road map that shows the way to your destination. Yet sometimes the journey does not go quite the way you expected.

While a road map will probably outline the streets and roads you need to take and possibly even key points of interest to view on the route, reading the map is not like driving along the road. No map can tell you what the driving conditions will be like. No map will be able to anticipate how you will feel on the day or how other drivers will react to your driving. Yet all of these things can influence the quality of your trip.

Learning pathways, while outlining the steps you will take, cannot predict exactly how things will go on the day. There are many variables, which will have an impact on how the session actually runs.

When you are facilitating work-based learning, you are working with the existing knowledge, skills and experiences of the learners you are supporting. As no two learners are ever exactly the same, you cannot expect that every time you cover the same topic the outcomes will be the same. The outcomes will depend on the people present, the state those people are in on the day and the stage they are at in their learning process.

There are many reasons why you may need to adjust your approach. You cannot accurately predict how learners will respond to the material you have developed as part of the process of facilitating their learning. The activities and presentations you used successfully for one learner may not work in the same way for another. An activity that you thought would be easy and fun may in fact turn out to be far too difficult for the current learners. Sometimes, external factors affect learners, changing behaviour patterns. You need to overcome these barriers to learning.

When one approach does not work in the way you anticipated, you may need to quickly substitute different tasks or activities. Tasks or activities always need to be selected because of their appropriateness for the learner, the learning goal and where they are on the pathway. If what you have planned is not working, try something else. Choose something more suitable for the learner and the context.

One of the reasons you may need to adjust your session is because an OHS hazard has occurred.

This may be because something happens:

- to the venue, location or environment
- during the activities to be undertaken
- to the equipment to be used
- because of the interactions between the learners.

While OHS issues, including hazards, should have been identified and addressed in the learning pathway, you should also think about them at the time you are facilitating, as unforeseen things can occur.

Another reason that you may need to adjust your approach is because an equity or additional support need may only become apparent during the process of facilitating the session. For example, you may need to:

- adjust your activities or how instructions are given
- resolve conflict arising from different values or attitudes to diversity
- provide additional resources.

Another reason you may need to change your approach is because the relationship between your learner and yourself, or your learner and others involved, might not be working.



What strategies can you suggest to make adjustments to your approach to deal with unanticipated situations and barriers to learning?

For example, if the relationship between your learner and an expert co-worker who is supporting and guiding the learner is not working, how will you adjust what you have planned?

What factors do you need to consider when modifying your approach?

If you can't cover everything you expected to, how will you ensure learners develop competence in all required areas?

## Activity      Developing strategies to change your approach

Think about some activities you have planned already. Develop a list of reasons why you might need to change your approach and what you might do to address this if it happens. If possible, talk to others about your ideas, or develop the list with others in a brainstorming session.

## Case study      Grace talks about how she learnt to facilitate

**Alinka:** 'So how do you learn how to make sure your learner learns?'

**Grace:** 'Oh, good question, it's all been a learning curve for me, but this was the big bit!'

**Alinka:** 'What do you mean?'

**Grace:** 'Well, I needed to learn about assessment techniques, and I needed to learn how to monitor the learner's progress without being a bossy boots or nosy! The HR people have got all these ideas about what a work-based facilitator should be and what the relationship between a learner and a facilitator should be. It's all good stuff about learners being in control of their learning and facilitators respecting differences. The end result is that the learner learns—that's the theory!'

'But at first, I found it hard to implement these ideas. I had to balance what we needed to do to meet the expectations of our clients with the fact that a learner might be providing the service and be doing it too slowly, or even wrongly. I spoke to HR; they gave me a book about facilitation techniques and we spent time talking through issues like competing demands. Then we moved on to questioning techniques and we practised those together. We set up role-plays and taped them. We did the same for feedback techniques. This was great, as I then practised my questioning techniques in a different way. It became my own little learning pathway! In the end it helped me monitor the learners, and I could see where I needed to change my approach if things weren't working for the learner.'

Then I enrolled as a student to learn about being an assessor. This helped, too. I applied what I learnt in my job. I'm not a qualified assessor yet, so someone comes in from the TAFE college to do the final assessment for the trainees. But I see the assessment methods and tools they use, and I develop similar ones for my staff with the help of HR people. This is all part of the support the

department gives to the work-based learning program. I have to remember to be prepared, that's important, especially if things aren't going so well with the learner's progress. It's lots of work, but I think I have learnt more than my staff or my trainees! So now I have the skills and knowledge to know if my learner is learning, and when they have achieved their goal...well, I think I do!



Summarise the ways in which Grace has worked towards becoming a better facilitator. What support has her organisation provided?

What are your thoughts about how Grace has overcome her difficulties?

### **Activity      Improving your facilitation techniques**

Reflect on the aspects of your facilitation practice that you think need developing.

Use the information in this Learner Guide to work towards improving these aspects in your practice.

Which aspects do you think need improving?

Develop a list of approaches that you can use, taking into account the support available in your practice environment, to become a better facilitator.

One approach you can use is to practise in the areas you have identified as much as possible. Gain feedback from others about the aspects you are trying to improve. You could do this either by practising in front of others or by arranging to videotape or audiotape your session.

Reflect on this process in your resource kit or journal.



## Activity Putting everything into practice

For the learning pathways you have developed, implement them according to the agreed pathway and strategies. Monitor your learners along the way.

Provide details of how it went. Did it go according to plan? What worked and what didn't?

What support did you receive from your practice environment? Did it match your expectations?

Did you need to change your approach? Why?

Did your learner learn? How do you know?

Make sure you have explained how and where you:

- applied the principles of adult learning
- applied the knowledge you had about your learners' preferred learning styles
- complied with your practice environment's legislative and regulatory requirements (including OHS)
- provided support to your learners. Did it go according to plan? Why or why not? If it didn't, how did you cater for any changes that occurred?

Explain how the integration between external learning activities and work-based activities went, if applicable.

Did your list of criteria work? Explain what did or didn't work. Make a new list of criteria for next time.

Reflect on facilitating work-based learning. What would you do differently in future?

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## 6 Reviewing the learning pathway

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In this Learning Topic, you will look at what is involved in reviewing the work-based learning pathway you have planned and implemented.

The definition of 'review' in the Shorter Oxford Dictionary is:

*The action of looking over a book etc. for the purpose of correction or improvement; revision... an inspection, an examination.*

*...a retrospect, a survey of the past in order to correct or improve.*

Reviewing the work-based learning pathway involves *evaluating* it with a view to highlighting what went well, and what could be improved. Options for improvement can then be documented, discussed and implemented.

You should focus on reviewing:

- a pathway
- the learning that occurs during the implementation of the pathway (this could include *assessing* the learner)
- the results in the workplace for the learner and the organisation.

### Why review?

Here are some reasons to undertake a review of the work-based learning pathway:

- to decide whether to continue following this learning pathway
- to improve your planning, content, resources, delivery and assessment
- to gain information on how to improve future learning pathways
- for learners to have the opportunity to reflect on their own learning pathway and contribute to improvements
- to undertake self-assessment and reflection, and identify opportunities for improvement as a facilitator
- for accountability, legitimacy and promotion of the learning pathway
- to meet the needs of external organisations involved in the learning pathway
- to comply with any legislative or regulatory requirements (including the AQTF).



What do you think of these reasons?

Can you think of others?

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### **Activity      External requirements to review in your practice environment**

Are there any external review or evaluation requirements that impact on your proposed learning program and how you review it?

Document your findings in your resource kit and discuss them with your facilitator and other learners.

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## **Planning the review**

You need to spend some time planning the review process while you are developing the learning pathway.

You need to find out the scope and purpose of the review:

- What is/are the specific purpose/s of the review?
- Who are you doing it for?
- What, if any, constraints are there?
- What is it about the learning pathway you are reviewing?
- What component of the learning program is being reviewed? Is the entire program being reviewed, or a particular section?
- How will the review be undertaken?
- How will the information be collected?
- How will the information be analysed?

## When should you review a program?

You should plan to review the learning pathway while it is occurring (formative evaluation) and at the end (summative evaluation).

### Formative evaluation

Formative evaluation collects data while learning is in progress. It can take place on a formal basis or when it becomes apparent that an improvement is necessary. This could be triggered through feedback or personal reflection.

Formative evaluation could be about checking your progress, budgets, schedule and completion rates.



Discuss or think about the formative evaluation strategies in the following snippets—one formal, one less formal. Would these strategies be useful for your review? Why or why not? What else do you think Robyn could have done?

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#### Snippet      A formative evaluation strategy

Sven was facilitating a work-based learning pathway to enhance the frontline management skills of workplace supervisors. Sven had scheduled 15 minutes at the end of every month for a discussion with all of the available supervisors to allow people to air their thoughts and concerns. The discussion was recorded and uploaded online for those that missed the meeting to listen to later. They could post their own comments via a discussion board.

Sven also planned an evaluation meeting half-way through the program. He arranged a discussion based on evaluating the learning program to date. He planned for a final face-to-face meeting to be devoted to consolidating learning, reflecting and evaluating the whole program.

This ensured that all outstanding issues were discussed, people were listened to, and the pace of the program suited all of the learners.

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### **Snippet      Less formal formative evaluation**

It became apparent during the course of a work-based learning pathway that several learners were not turning up to the sessions that had been arranged in the on-site training room. When she spoke to these learners, the facilitator, Robyn, found out that some were not able to attend the planned sessions because they were too busy doing their jobs. She thought that she had arranged the session times around work schedules, but a new order had come in and work commitments had changed for some of the learners.

Robyn had originally needed to arrange training room sessions because of OH implications involved in learning on the job. It was expected that what they learnt in the classroom sessions could later be practised on the job with supervision.

The on-the-job and training room activities had been sequenced in a way to build knowledge and skills incrementally.

Robyn realised she needed to think more about the timing of the sessions so that everyone could attend. She spoke to the learners and their supervisors and modified the session times accordingly.

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### **Summative evaluation**

Summative evaluation occurs at the end of the learning program and allows you to formally examine the entire learning pathway.

The final evaluation could be about the outcomes, the schedule, the budget, or completion rates.

Even though summative evaluation occurs at the end of the learning program, it is likely you will be collecting data during the process. You may have already used some of this data during your formative evaluation activities.

## How and what to review

There are many aspects you could review. In broad terms, they include:

- things about the learner
- things about the facilitator
- things about the pathway.

There are many tools and methods you can use to find out this information.

The easiest and simplest way to gather information is to ask. This guide has stressed that the facilitator must continually monitor and measure the learners' reaction throughout the learning process. Specifically, get feedback on:

- how learners feel about their learning pathway
- how they think their learning is going
- what barriers to learning they are experiencing.

This should be done while the learning is happening, as well as at the end of the learning pathway.

You could also collect the required data by:

- distributing questionnaires
- asking learners to keep diaries
- keeping a diary yourself (and if there are other facilitators involved, ask them to keep a diary, too)
- conducting direct interviews or conversations
- organising a discussion group
- observing performance
- looking at results.



Add any additional ideas you have to the list of data collection methods.

## What type of data should you collect?

It is best to collect both qualitative and quantitative data.

Quantitative data is easy to measure and quantify and relates to outputs, costs and time. For example, the cost of providing the training and the costs connected to the number of participants getting to the end of their learning pathway.

Qualitative data is difficult to measure, but allows for feelings and attitudes to be included. Examples include participant attitudes to the pathway—how do they feel about the facilitation provided?

The information that you collect needs to be reliable and authentic data. The data can be formalised through the use of such methods as:

- evaluation/feedback sheets
- formal interviews with learners and their supervisors or managers
- evaluation workshops
- performance appraisals.

An example evaluation feedback form is provided in the Appendices section of this guide.

Alternatively, data can be gathered using an informal approach, such as:

- listening to and observing the learners
- discussing the progress of the learners with work colleagues
- discussing the progress of the learners with the workplace supervisor or manager
- holding follow-up sessions with each learner, where general discussion about their progress and their responses to the learning pathway are encouraged.

## Kirkpatrick's model of evaluation

One well known and often used model of evaluation was developed by Donald Kirkpatrick. It is not the only evaluation model, but it is included here as a suggested process for reviewing work-based learning.

Kirkpatrick is an academic who has done a great deal of work developing models for evaluating and reviewing training programs.



Kirkpatrick is the author of a number of books, in particular, the popular *Evaluating Training Program— the four levels* (1998, San Francisco: Berrett-Koehler Publishers).

If you refer to the Meansbusiness website, you will be able to access a summary of this book <<http://www.meansbusiness.com/Knowledge-and-Learning-Books/Evaluating-Training-Programs.htm>> accessed February 2005.

Kirkpatrick's four levels of evaluation are:

- Level 1—Reaction.
- Level 2—Immediate or Learning.
- Level 3—Intermediate or Application.
- Level 4—Ultimate or Performance.

The four levels present a sequence of ways to evaluate programs, each important in their own way.

### Level 1—Reaction: did they enjoy learning?

Data is gathered in relation to learner satisfaction. Data might be gathered about the level of satisfaction with:

- facilitators
- learning resources
- teaching and learning processes
- facilities
- timing and duration.

For a work-based learning pathway that has external learning activities, you could also ask your learners whether they thought these activities were well integrated with the work-based learning activities.

Tools that would be suitable for this level include interviews, surveys about the learners' reactions and focus groups.

**Level 2—Learning: did the learner learn?**

This level measures whether the learning goals have been reached. Evaluation at this level seeks to determine the extent to which the learning has resulted in

- improved knowledge
- increased skills
- changes to attributes.

At this level, you should be focusing on reviewing the effectiveness of the work-based learning pathway against the objectives, processes and models used.

As developers and implementers of work-based learning, you are specifically interested in what your learner has learnt, what skills they have developed and improved, and what attributes have changed. To measure the change, you need to know their level of the skills and knowledge before the learning pathway was implemented. This information is obtained through pre-assessment.

You can formally measure the changes to a learner's skills and knowledge by assessing the learner. Therefore, for this level of evaluation, a large part of the process includes assessment activities.

You might also want to find out if the learner:

- is taking responsibility for their own learning
- is reflecting on the learning process and acting on that reflection
- is able to transfer the knowledge and skills they are learning to other work situations.

**Level 3—Behaviour: did they use it?**

This level measures the extent to which the new knowledge, skills and/or attributes are transferred to the job.

At this level you want to measure the effect of the training on job performance. You may wish to measure whether the cost, time, effort, energy and money expended in developing and implementing the learning pathway has been justified by a measurable improvement. The improvements could be in output rates, quality standards, reduction of downtime, reduction of accidents or near misses, and reduction of rework.

Useful tools that can be used for this level include:

- observation of the learner in the workplace to look for application of knowledge, skills and/or attributes
- pre and post-assessment
- interviewing learners, managers, colleagues and subordinates
- performance reviews
- behaviour rating scales.

Therefore assessment activities, particularly summative assessment activities, are an important tool at this level.

#### **Level 4—Results: did the learning produce benefit to the organisation?**

This level measures the results of the learning pathway in relation to the whole organisation.

Depending on what your original learning goals were, you could look for:

- increased production
- improved quality
- decreased costs
- reduced frequency or severity of accidents
- increased sales
- time saving
- new products
- new processes
- reduced turnover
- higher profits
- fewer complaints
- better retention rates
- higher morale
- progress towards strategic goals.



What tools might be useful to evaluate the results of the program?

How would you know if it was the learning pathway that created these benefits?

### The cost of learning

At Kirkpatrick's Level 4, the data you gather could be used as part of a cost-benefit analysis. A cost-benefit analysis compares the cost of your learning pathway and the benefits that have accrued from it. Your management team may want you to provide data so they can determine whether:

- the learning pathway has added value to the business, in terms of its productivity, its organisation, its scope and its vision
- the learning pathway has enhanced the transition or change processes outlined in the client's brief
- the enterprise has gained sufficient return on their training investment.

### Activity      Is Kirkpatrick's model useful for you?

Evaluate the suitability of Kirkpatrick's model of evaluation for your learning pathway and/or your practice environment.

## Keeping records

How will you document and record the outcomes of work performance, learning achievement and your review?

Keeping records that provide evidence of work performance, learning achievement and your review may be part of the requirements to comply with the *AQTF Standards for RTOs*. If your practice environment is not an RTO or working with an RTO to provide accredited training, there should still be requirements to keep records of:

- your learners
- the learning pathway
- work performance
- learning achievement
- any reviews.



**Activity      Record-keeping systems and practices in your practice environment**

Find out about your practice environment's record-keeping systems and practices.

What records are you required to keep in relation to work performance, learning achievement, your learning program and your review process?

Find any documentation such as policies and procedures, proformas or templates. Remember, these could be in hardcopy or electronic format.

Are there any guidelines about how long you need to keep these different sorts of records?

Provide details of what you have found out about record-keeping in your practice environment.

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Discuss how the changes to work-based practices and routines came about during Shelley's learning pathway, in the case study below.

How did Shelley's recommendations come about?

Was it because of evaluation activities or did they come about in another way?

What are your thoughts about how the recommendations came about?

How would this process be accepted in your practice environment?



## Opportunities for improvements

Once you have collected information using the various evaluation techniques, you should be able to come to some conclusions about the effectiveness of the learning pathway and your facilitation. You should discuss these with relevant personnel.

Changes to your approach should then be documented and put into practice. For a work-based learning pathway, you may find that your review suggests improvements and changes to work-based practices and routines. If this is the case, you should also be putting forward recommendations about these changes to the relevant people so they can decide whether to put these into practice.

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### Case study Ho Hum Hand Drums

Marco and Paulo own a company called Ho Hum Hand Drums. The company produces premium hand made musical percussion instruments including a range of tunable frame drums, tambourines and bodhrans. Marco and Paulo are looking to expand the business and enter the export market and, as a result, plan to broaden and expand their in-house learning and development program. They would like to introduce a range of learning activities to further develop the employees and introduce a new range of percussion instruments to the business. They have approached the RTO that Joy works for, with a view to developing a relationship or alliance to provide quality workplace training.

Shelley works at Ho Hum Drums. Her work involves building rims for frame drums. She has been nominated to begin a work-based traineeship; the *Certificate IV in Business (Frontline Management)*. The trainer, Joy, has encouraged Shelley to develop a portfolio of evidence or self-assessment against the eight units of competency required to successfully complete this qualification. Currently, Shelley is the leading hand, whose responsibility in the workplace is to supervise a small team of fellow workers and schedule the production of tunable tambourines.

Marco, Paulo, Joy and Shelley are on the floor in the production area. Marco has asked Shelley to streamline the rim manufacturing process and has encouraged her to submit her ideas and any suggestions for change. Joy has proposed setting Shelley's learning program into a series of process improvement projects. She believes that this will benefit the business, streamline a number of production processes, and provide a stimulating and logical pathway for Shelley.

Shelley has consulted with her peers, asked them for their suggestions and input, reflected on the brief given to her by the owners, and documented her findings.

- Shelley:** 'One of the biggest problems we have in reorganising the team's work space is storing materials.'
- Marco:** 'Shelley, we always buy the steel from the same supplier, it comes in standard three metre lengths and that's the way it is and has been for a long time.'
- Shelley:** 'I appreciate that Marco, but speaking to the supplier recently, he has confirmed that the stainless steel is supplied in six metre lengths. We have always had it delivered as three metre lengths due to the fact that our racks are arranged that way. So I started thinking about it and it occurred to me to ask, why do we get it delivered in three metre lengths?'
- Marco:** 'Because that's the way we've always taken the steel.'
- Shelley:** 'But is there any particular reason?'
- Marco:** 'Well, it fits into the storage space.'
- Paulo:** 'So what's your point, Shelley—who cares what length the steel is delivered in?'
- Shelley:** 'We manufacture tunable drums ranging from 77 mm in diameter to 216 mm in diameter.'
- Marco:** 'So you want to tell us our business now, do you Shelley?'
- Shelley:** 'Not at all Marco, but we could significantly save on both wastage and storage space if we have the steel delivered in two metre lengths given that the largest length we need is 1356.48 mm and the smallest 483.56.'

Marco and Paulo look at each other and begin to laugh.

- Joy:** 'I can see by your reaction that you appreciate Shelley's point.'
- Paulo:** 'It's funny, Marco and I have spent hours thinking and planning how we can renovate this space, it never occurred to us to alter the size of the raw material.'
- Marco:** 'Yes Shelley, great idea. Sorry about getting a bit testy.'
- Shelley:** 'It's OK Marco, but it wasn't my idea, one of the team thought it up. Jose mentioned it but no-one had ever asked him.'
- Paulo:** 'Joy, I think your idea of learning through process improvement projects might be the way to go. Well done, Shelley.'



Reflect on the usefulness of these review methods you have used. What worked? What didn't? Why did or didn't the methods work?



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### **Activity      Reflecting on your role and skills as a facilitator**

Now that you have facilitated your work-based learning pathway, reflect on how you facilitated the program. For example, how did you:

- satisfy the principles of adult learning
- cater for the learners' profile and characteristics (including any access and equity considerations)
- encourage the learner to take responsibility for their learning?

Also, make a final reflection on the knowledge, skills and attributes you used, and where and why you used these.

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# Resources

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## Books

Billett, S 2001, *Learning in the Workplace. Strategies for Effective Practice*. Allen and Unwin, Sydney)

Burns, R 2002, *The Adult Learner at Work. The Challenges of Lifelong Education in the New Millennium*, 2<sup>nd</sup> edition, Business and Publishing, New South Wales.

Department of Employment, Education and Training, 1989, *Training Needs Analysis*, AGPS, Canberra.

Foley, G (ed), 2000, *Understanding Adult Education and Training*, 2<sup>nd</sup> edition, Allen & Unwin, Sydney.

Hagar, P 1997, *Learning in the Workplace. Review of Research*, NCVER, Adelaide.

Hogan, C 2003, *Practical Facilitation: A Toolkit of Techniques*, Kogan Page, London.

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Johnson, S 2001, *Meeting the Challenge of Change*, Eastern House, Croydon.

Kirpatrick, D 1998, *Evaluating Training Programs – the four levels*, Berrett-Koehler Publishers. San Francisco.

Knowles, M S 1970, *The Modern Practice of Adult Education: Andragogy Versus pedagogy*, Association Press, New York.

Knowles, M S 1990, *The Adult Learner: A neglected species*, 4<sup>th</sup> edition, Gulf Publishing Houston.

Landsberg, M 1997, *The Tao of Coaching*, Harper Collins Business, London.

Marsick, V & Watkins, K 1999, *Facilitating Learning Organisations. Making Learning Count*, Gower, England.

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Zeus, P & Skiffington, S 2000, *The Complete Guide to Coaching at Work*, McGraw-Hill Companies Inc, Sydney.

## Publications

Kaprielian, VS and Gradison, M 'Effective Use of Feedback' *Fam Med* 1998; 30 (6): 406-7.

Peoples, M 1997, *Good... better...best! A self-evaluation activity for vocational teachers and trainers*, ANTA.

## Websites

**Australian Capital Territory Department of Education and Training**

<<http://www.decs.act.gov.au>> accessed February 2005.

**Australian Copyright Council**

<<http://www.copyright.org.au>> accessed February 2005.

**Australian National Training Authority (ANTA)**

<<http://www.anta.gov.au>> accessed February 2005.

The Australian National Training Authority (ANTA) is a statutory authority providing a national focus for vocational education and training. The website includes details of VET, strategy papers, directions and policies, publications, links, a glossary of VET terms, details of the Australian Quality Training Framework.

**Note:** At the time of finalising these resources the decision to abolish ANTA and transfer its responsibilities to the Department of Education, Science and Training (DEST) by July 2005 was announced. You might need to check the currency of the links provided in this resource in the transition period.

*Specific pages on this website are:*

- Australian Quality Training Framework (AQTF) and Standards for Registered Training Organisations (RTOs)  
<<http://www.anta.gov.au/aqtfWhat.asp>>AQTF accessed February 2005.
- Bridging Pathways (the five-year national strategy 2000–2005 increasing opportunities for people with a disability in VET):  
<<http://www.anta.gov.au/dapBridging.asp>> accessed February 2005.
- National Strategy for VET 2004 – 2010:  
<<http://www.anta.gov.au/dapStrategy.asp>> accessed February 2005.
- Partners in a Learning Culture (the five-year national strategy 2000–2005 for increasing opportunities for indigenous people in VET):  
<<http://www.anta.gov.au/dapLearning.asp>> accessed February 2005.

**Australasian Legal Information Institute (AUSTLII)**

The AUSTLII website includes legislation, regulation and case law:

<<http://www.austlii.edu.au>> accessed February 2005.

### **The Co-Intelligence Institute**

*Facilitation*, 2003

<<http://www.co-intelligence.org/P-facilitation.html>> accessed February 2005.

### **De Montfort University**

Information about Knowles' theory of andragogy can be found on the following page of the De Montfort University website:

<<http://www.dmu.ac.uk/~jamesa/learning/knowlesa.htm>> accessed February 2005.

### **Flexways**

Flexways is a resource to support professional development planning for flexible learning in the Australian VET Sector.

Details of the importance of learning styles, and a summary of some of the more well known theories can be found on this page of the Flexways website:

<<http://flexways.flexiblelearning.net.au/learning/index.asp>> accessed February 2005.

### **Group Training Australia**

<<http://www.gtaltd.com.au/>> accessed February 2005.

### **Indiana State University**

This page on the Indiana State University website has useful information on learning styles in general, and also the implications for teaching:

<<http://www.indstate.edu/ctl/styles/ls1.html>> accessed February 2005.

### **Little Falls Christian Centre**

The following page on the Little Falls Christian Centre website has details about icebreakers:

<<http://www.littlefallsonline.com/icebreakers.cfm?iceID=12>> accessed February 2005.

### **Meansbusiness**

The Meansbusiness website gives a summary of Donald Kirkpatrick's book about evaluation:

<<http://www.meansbusiness.com/Knowledge-and-Learning-Books/Evaluating-Training-Programs.htm>> accessed February 2005.

### **Mentoring Australia**

<<http://www.dsf.org.au/mentor/index.htm>> accessed February 2005.

### **National Centre for Vocational Education Research (NCVER)**

NCVER is Australia's principal provider of VET research and statistics.

The document '*At a Glance: What makes for good workplace learning*', 2003 can be accessed online at the NCVER website at:

<<http://www.ncver.edu.au/research/core/cp0207.pdf>> accessed February 2005.

### **National Occupational Health and Safety Commission (NOHSC)**

<<http://www.nohsc.gov.au>> accessed February 2005.

### **National Reporting System (NRS)**

<<http://www.nrs.detya.gov.au/default.htm>> accessed February 2005.

### **National Training Information Service (NTIS)**

The NTIS has been developed by ANTA to provide access to current and emerging training market information and products in vocational education and training. Information about competency standards and Training Packages can be found on the NTIS website:

<<http://www.ntis.gov.au>> accessed February 2005.

### **New Apprenticeships**

<<http://www.nacinfo.com.au>> accessed February 2005.

### **New South Wales Department of Education and Training**

<<http://www.det.nsw.edu.au/trainingmarket>> accessed February 2005.

### **Northern Territory Department of Employment, Education and Training**

<<http://www.apprenticeships.nt.gov.au>> accessed February 2005.

### **Office of the Federal Privacy Commissioner**

The Office of the Federal Privacy Commissioner is an independent Office which has responsibilities under the federal *Privacy Act 1988* (Cth)

<<http://www.privacy.gov.au/>> accessed February 2005.

### **Ohio State University**

The Building Dynamic Groups page on the Ohio State University website provides information about icebreakers:

<[http://www.ag.ohio-state.edu/~bdg/ice\\_breakers.html](http://www.ag.ohio-state.edu/~bdg/ice_breakers.html)> accessed February 2005.

### **Queensland Department of Employment and Training**

<<http://www.trainandemploy.qld.gov.au/>> accessed February 2005.

### **Reframing the Future**

Reframing the Future is a national professional development project building a highly skilled and professional VET workforce capable of supporting a quality integrated national VET system.

<<http://reframingthefuture.net/>> accessed February 2005.

Various documents about work-based learning can be found on this website.

Go to the Publications section of the Reframing the Future website and choose the sub-program 'Skills Development for VET Practitioners'.



### **Seattle Community Network**

Details on icebreakers:

<<http://www.scn.org/ip/cds/cmp/modules/tm-ice.htm>> accessed February 2005

### **South Australian Department of Education, Training and Employment**

<[http://www.training.sa.gov.au/ovet\\_home.asp](http://www.training.sa.gov.au/ovet_home.asp)> accessed February 2005.

### **Southern Health**

This page on the Southern Health website provides details about the principles of adult learning:

<[http://www.southernhealth.org.au/cpme/articles/adult\\_learning.htm](http://www.southernhealth.org.au/cpme/articles/adult_learning.htm)> accessed February 2005.

### **Support4Learning**

For a comprehensive site with a range of links to other sites about learning styles visit this page on the Support4Learning website:

<<http://www.support4learning.org.uk/education/lstyles.htm>> accessed February 2005.

### **Tasmanian Office of Post Compulsory Education and Training**

<<http://www.opcet.tas.gov.au>> accessed February 2005.

### **Thiagi**

*Secrets of Successful Facilitators*, 1999

<<http://www.thiagi.com/article-secrets.html>> accessed February 2005.

### **Tree Bressen Group Facilitator**

*Presentation Points*, 2003.

<[http://www.treegroup.info/toolbox/B11-facilitation\\_points.html](http://www.treegroup.info/toolbox/B11-facilitation_points.html)> accessed February 2005.

### **Victoria Office of Training and Tertiary Education**

<<http://www.otte.vic.gov.au/apprenticeships/newapps/index.htm>> accessed February 2005.

### **Vocational Education and Assessment Centre (VEAC)**

VEAC conducts research on delivery and assessment in the VET sector as part of TAFE NSW. This page on the VEAC website provides details about adult learning principles: <<http://www.veac.org.au/tchlearn.html>> accessed February 2005.

### **Western Australian Department of Education and Training**

<<http://www.training.wa.gov.au>> accessed February 2005.

### **WestOne**

WestOne is a Western Australian multi-media and technology institution dedicated to supporting the VET sector. WestOne produces learning materials in multiple formats for multiple delivery modes. For details about adult learning principles go to:

<<http://www.westone.wa.gov.au/toolboxes/equity/site/bridging/alp/>> accessed February 2005.

### **Workplace English, Language and Literacy (WELL) programme**

Information about the WELL programme can be found on the website of the Department of Education, Science and Training at:

<<http://www.detya.gov.au/ty/well>> accessed February 2005.

## **Other resources**

Department of Education, Training and Youth Affairs 2001, *Guide 6: Assessment approaches for small workplaces*, A guide to developing Training Package assessment materials, DETYA, Melbourne.

To access this resource online go to <<http://resourcegenerator.gov.au>> then:

1. select 'Tell me more'
2. select 'Log on as guest'
3. choose an industry area from the drop down menu, then select 'Update'
4. select 'Training Package Assessment Guides'
5. choose one of the ten guides, which are then presented in chapters.

Copyright information about printing for teaching purposes can be accessed at: <<http://www.resourcegenerator.gov.au/LoadPage.asp?page=copyright.htm>>.

# Appendices

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Appendix 1 Sample learning pathway

Appendix 2 Sample of evaluation feedback form

## Appendix 1: Sample learning pathway

**Workplace:** .....

**Name of employee:** .....

**Learning goal:**

[illegible]

**Benchmark/unit of competency:** .....

### Instructions to facilitator:

[illegible]

| Required knowledge or skill | Area of work | Learning activity and recommended strategy | Learning sequence * |
|-----------------------------|--------------|--------------------------------------------|---------------------|
|                             |              |                                            |                     |
|                             |              |                                            |                     |
|                             |              |                                            |                     |
|                             |              |                                            |                     |
|                             |              |                                            |                     |
|                             |              |                                            |                     |
|                             |              |                                            |                     |
|                             |              |                                            |                     |
|                             |              |                                            |                     |
|                             |              |                                            |                     |

**Learning pathway—additional notes**

Implications for work routines and practices and the work environment:

(include actions required—including any proposals to change work routines and practices and the work environment to support more effective learning)

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- 
- 
- 

**Other people involved:**

- 
- 
- 
- 
- 

**Other learning activities:**

- 
- 
- 
- 
- 

**Opportunities for transferring learning:**

- 
- 
- 
- 
-

**Assessment requirements:**

- Pre-assessment to determine existing level of knowledge, skills and attributes:
  - 
  - 
  -
- Pre-assessment to determine language, literacy and numeracy levels:
  - 
  - 
  -
- Formative assessment to monitor the progress of the learner while undertaking learning activities (*for example, questioning learner and others, observing their work, sampling their work*)
  - 
  - 
  -
- Summative assessment to ensure the learner has the required knowledge and skills
  - 
  - 
  -

**Support needs:**

- 
- 
- 

**Timelines:**

**Costs:**

## Appendix 2: Sample of evaluation feedback form

### LEARNER EVALUATION

Work-based learning pathway: \_\_\_\_\_

Please answer the following questions carefully and make appropriate comments where necessary.

Use the following scale to answer the questions; place a circle around the number that best reflects your response.

| Not at all | Not very well | Fairly well | Very well | Extremely well |
|------------|---------------|-------------|-----------|----------------|
| 1          | 2             | 3           | 4         | 5              |
| Poor       | Fair          | Good        | Very good | Excellent      |

#### CONTENT

|    |                                                                                        |   |   |   |   |   |
|----|----------------------------------------------------------------------------------------|---|---|---|---|---|
| 1. | Were the course objectives made clear to you at the start of the learning pathway?     | 1 | 2 | 3 | 4 | 5 |
| 2. | Was the content relevant to current industry best practice?                            | 1 | 2 | 3 | 4 | 5 |
| 3. | Was the content relevant to current legislative and regulative requirements?           | 1 | 2 | 3 | 4 | 5 |
| 4. | Was the length of the pathway appropriate to the achievement of the course objectives? | 1 | 2 | 3 | 4 | 5 |

#### DELIVERY

|    |                                                                                       |   |   |   |   |   |
|----|---------------------------------------------------------------------------------------|---|---|---|---|---|
| 1. | Were the teaching methods appropriate for the learning objectives?                    | 1 | 2 | 3 | 4 | 5 |
| 2. | Did the sessions involve your active participation?                                   | 1 | 2 | 3 | 4 | 5 |
| 3. | Did the teacher(s) provide regular feedback on your progress while you were learning? | 1 | 2 | 3 | 4 | 5 |

#### ASSESSMENT

|    |                                                                                                           |   |   |   |   |   |
|----|-----------------------------------------------------------------------------------------------------------|---|---|---|---|---|
| 1. | Were the assessment requirements made clear to you when you commenced the learning pathway?               | 1 | 2 | 3 | 4 | 5 |
| 2. | Were the assessment methods appropriate for the learning objectives?                                      | 1 | 2 | 3 | 4 | 5 |
| 3. | Having completed the pathway, are you now confident of applying the skills and knowledge you have gained? | 1 | 2 | 3 | 4 | 5 |
| 4. | Were assessment reports provided promptly and accurately to you?                                          | 1 | 2 | 3 | 4 | 5 |

#### RESOURCES

|    |                              |   |   |   |   |   |
|----|------------------------------|---|---|---|---|---|
| 1. | Were the learning materials: |   |   |   |   |   |
| a. | available when required?     | 1 | 2 | 3 | 4 | 5 |
| b. | well-organised?              | 1 | 2 | 3 | 4 | 5 |
| c. | easy to understand?          | 1 | 2 | 3 | 4 | 5 |
| d. | easy to use?                 | 1 | 2 | 3 | 4 | 5 |
| e. | informative?                 | 1 | 2 | 3 | 4 | 5 |
| f. | relevant?                    | 1 | 2 | 3 | 4 | 5 |



| Not at all | Not very well | Fairly well | Very well | Extremely well |
|------------|---------------|-------------|-----------|----------------|
| 1          | 2             | 3           | 4         | 5              |
| Poor       | Fair          | Good        | Very good | Excellent      |

2. Were the following resources sufficient to meet the learning objectives? (Write "NA" if not applicable)

|                             |   |   |   |   |   |
|-----------------------------|---|---|---|---|---|
| a. computers                | 1 | 2 | 3 | 4 | 5 |
| b. videos                   | 1 | 2 | 3 | 4 | 5 |
| c. equipment, machines etc. | 1 | 2 | 3 | 4 | 5 |
| d. materials                | 1 | 2 | 3 | 4 | 5 |
| e. work space, classrooms   | 1 | 2 | 3 | 4 | 5 |

3. List any resources that you did not have access to or that were in short supply

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4. a. Did you require any special learning services to assist you in your studies, e.g. literacy, numeracy, other? ☐ Yes ☐ No
- b. Was this assistance provided? ☐ Yes ☐ No
- c. If "No", what special learning services did you require? 

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- d. Did you make use of any of the special learning services? ☐ Yes ☐ No
- e. Please specify the services you used. 

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#### COMMENTS

Please make any suggestions you feel would improve the content, delivery and assessment of the learning pathway and make any other comments you feel may be relevant.

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#### Delivery and assessment

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**Work placement**

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**Further suggestions and comments**

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Name: \_\_\_\_\_ Date: \_\_\_\_\_