



Professional Training Needs Identification and Design QQI Level 6 6N3325 Course Manual

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Introduction

Welcome to the Training Needs Identification & Design course from DCM Learning.

This course manual is designed to help you to take notes as you work through the interactive modules, exercises and videos that make up this course. This can then be used to assist you in preparing your assessments, as well as being a practical 'aide memoir' for you in your role as a trainer.

You will also see that a number of activities are built into the text in this document. These activities are designed to reinforce your learning and do not have to be submitted.

At the end of this course, you will be able to examine the impact of an organisation's strategy, policy, vision and mission statement on training and development, apply a range of specialised skills and tools in identifying the barriers to training, develop the skills and knowledge to examine the internal and external environmental factors influencing training and development and achieve the skills to successfully produce and implement a comprehensive Training Plan.

Within this manual you will find your detailed course topics along with additional information to further expand your knowledge and understanding.

NOTE: This manual is for your own use and does not need to be submitted to your tutor.

Introduction to Quality and Qualifications Ireland (QQI)

QQI – Quality and Qualifications Ireland is an independent, State agency responsible for promoting quality and accountability in education and training services in Ireland. It was established in 2012.

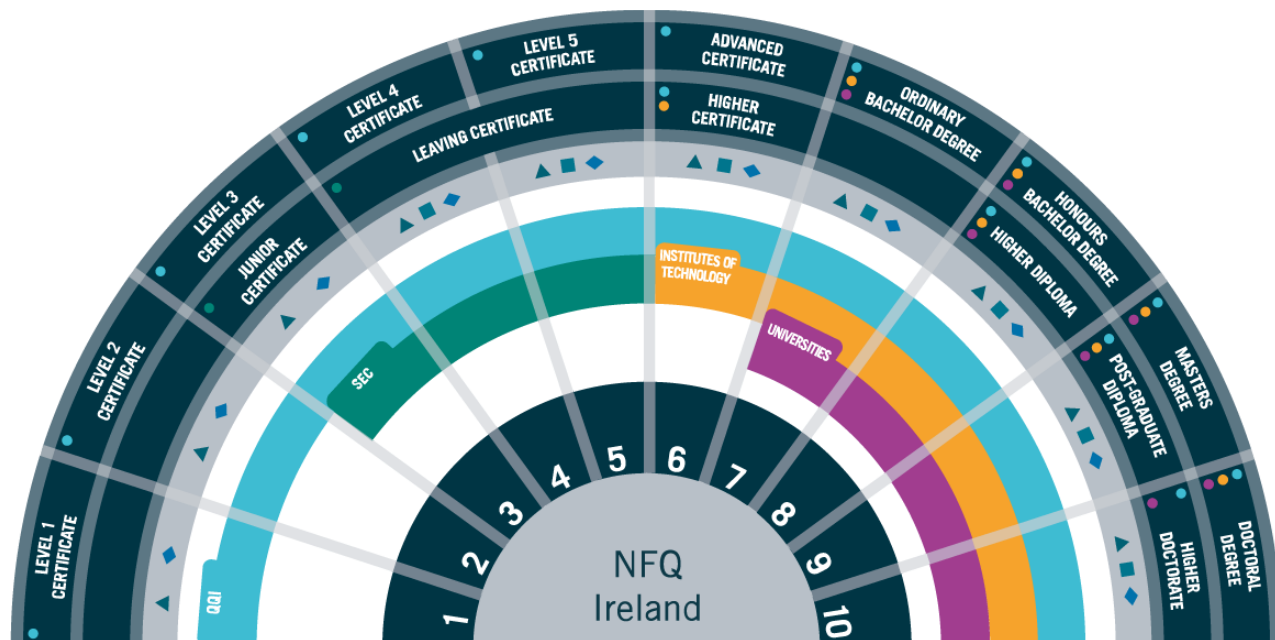
QQI's mission is to:

- promote the enhancement of quality in Ireland's further and higher education and training, and quality assure providers;
- support and promote a qualifications system that benefits learners and other stakeholders.

QQI's role as directly stated is to:

- promote, maintain and develop the Irish National Framework of Qualifications (NFQ), a 10-level framework for the development, recognition and awarding of qualifications in Ireland;
- approve programmes offered at a variety of schools, colleges and further and higher education and training institutions. These programmes lead to qualifications (QQI awards) listed in the NFQ, which are recognised internationally;
- regulate and promote the quality of programmes offered by schools and colleges leading to qualifications in the NFQ for the benefit of learners, employers and other interested parties;
- ensure that providers* offering national qualifications provide a positive, high-quality experience to international learners coming to study in Ireland. We will do this by authorising the International Education Mark (IEM);
- provide academic advice on the recognition of foreign qualifications in Ireland through a service called NARIC Ireland – the National Academic Recognition Information Centre. We also provide advice on the recognition of Irish qualifications abroad;
- inform the public about quality assured education and training programmes and qualifications through a database of programmes and a register of providers;
- advise the Minister for Education and Skills about national policy on quality assurance and improvement in education and training;
- manage a national scheme for the quality assurance of English language services (Accreditation and Coordination of English Language Services – ACE)

The National Framework of Qualifications (NFQ)



Qualifications frameworks describe the qualifications of an education and training system and how they interlink. National qualifications frameworks describe what learners should know, understand and be able to do on the basis of a given qualification. These frameworks also show how learners can move from one qualification, or qualification level, to another within a system. Over 150 countries are now developing, or have developed, a national qualifications framework.

The Irish NFQ, established in 2003, is a framework through which all learning achievements may be measured and related to each other in a coherent way. The many different types and sizes of qualifications included in the NFQ, are organised based on their level of knowledge, skill and competence. Because all NQF qualifications are quality assured, learners can be confident that they will be recognised at home and abroad.

Quality and Qualifications Ireland (QQI) has the responsibility to develop, promote and maintain the Irish NFQ. QQI also facilitates the recognition of foreign qualifications.

This course is at Level 6 on the NFQ.

Key Concepts in Training and Development

Definitions

The Oxford English Dictionary defines learning as:

(noun): the acquisition of knowledge or skills through study, experience, or being taught.

The Oxford English Dictionary defines training as:

(noun): the process of learning the skills that you need to do a job

Whilst this is a simple definition of training, during this course you will learn that training in itself may not always be that simple. As you work through each topic on the course, you will learn that there are many considerations that you, the trainer, will have to take into account, when designing and delivering a training programme.

This simple definition is not enough. For the purposes of this course, we define training as:

***Learning that is provided in order to improve performance on the present job.
(Nadler, 1984)***

Note that the definition states that training is provided for the present job. This includes training new personnel to perform their job, introducing new technology, or helping an employee to achieve the required standards of performance in the role.

Nadler and Nadler (1990) also distinguish between training and education. They see the function of training to improve performance on an individual's current job or task, education is for those jobs or tasks a person might do in the future. The difference between Training and Education may be described as the difference between know-how and know why. It is the difference between, for example, being trained as a pilot to fly a plane and being educated as an aeronautical engineer who understands why the plane flies and can design improvements to the way the plane flies.

Training tends to be focussed on skill development over shorter-time periods (e.g. up to 12 months), whereas Education tends to take place over a number of years.

Training typically occurs as part of Human Resource Development, (HRD) not to be confused with the human resource department, which is concerned with all aspects of employees, such as pay,

conditions of employment, welfare and equal opportunity and compliance with legislation. On the other hand, HRD is concerned with training, education and development.

HRD has been defined as an **organised** learning experience, conducted in a **definite time period**, to increase the possibility of **improving job performance** and growth.

We will consider this definition in three parts:

1. The first part of the definition, '**organised**', refers to the fact that the learning experience is conducted in a systematic way. Although learning can also be incidental or informal, training is concerned with the individual learning clear and concise standards of performance or objectives. Most of the training that we will be referring to throughout this course is concerned with the systematic and typically formal training that occurs in organisations. Of course, informal learning and training occur almost daily in any company or organisation.

Let us briefly consider what we mean by 'organisation'. If you are currently working, you most certainly belong to an organisation. If you are not working at present; you are probably a member of an organisation. Voluntary groups, charities, sports clubs and indeed social groups are all types of organisations. An organisation is typically defined as a group of common minded people who share the same ambition, vision, sense of purpose and indeed, objectives. Training can occur in any type of organisation, whether for-profit or a not-for-profit organisation. Most organisations will have a well-articulated mission or vision statement, which sets out the core purpose of the organisation and its ambitions. A sample mission or vision statement is mentioned below:

The core purpose of Organisation X Ltd is to maximise profits and to be the world leader in the provision of health care to its customers.

The mission and vision statement of most organisations is broad and often nebulous. The mission or vision of the organisation is typically achieved by having clear goals and objectives. Using the sample above, one of the goals might be to increase annual profits by 10% and an objective might be the 'how' this will be achieved, for example, "we will increase our profits by 10% over the next 12 months by winning 10 new customers each month."

Objectives are tools for guiding managers, learners, and by extension, trainers. Managers need objectives so that they know what kind of return they are receiving from their training investment. Learners need them so that they know what is expected of them. And trainers need them to plan and conduct the learning environment so that they may help the learners achieve the desired results.

This is commonly known as formal learning. Performance is improved by helping the learners to a new skill. Incidental or informal learning, on the other hand, usually is unplanned and often occurs by chance.

2. The second part of our definition above, ‘**conducted in a definite time period**’ is important as the amount of time that the trainee spends on training must be specified in advance. This is an important consideration for any trainer when designing and planning training.

3. The third and final part of our definition of training ‘the possibility of ~ and growth’ means that whilst the organisation may provide the facilities, finances and environment to facilitate learning, the ultimate responsibility for the success of the training lies with the trainer. This leads us nicely on to the role and responsibilities of the trainer.

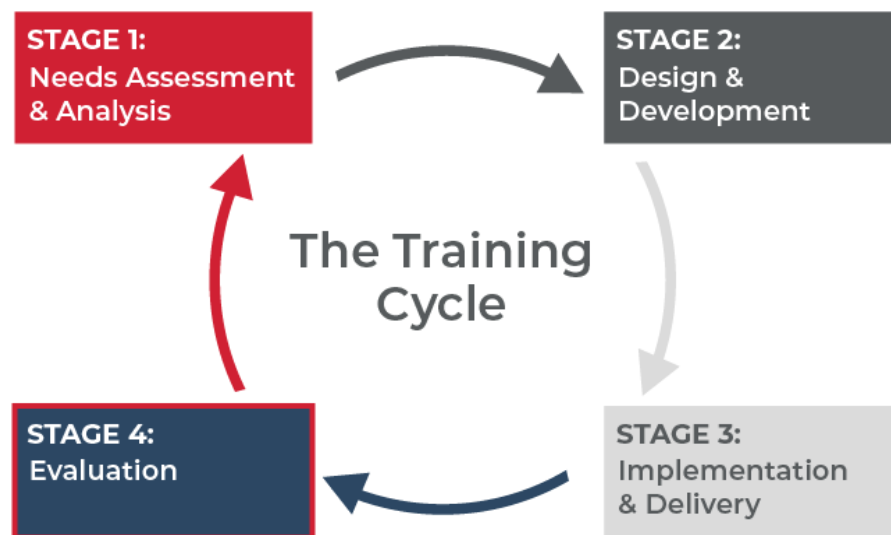


Fig 1.1 The Training Cycle



Test Yourself:

Without looking back, give in your own words, a definition of training.



My notes on Definitions

Training and Development Roles

The Trainer

In the simplest sense, a trainer is someone who imparts knowledge or skills to others. However, we will see that there is much more than that to being a successful trainer.

The American Society for Training and Development see the role of a trainer as encompassing the following:

- Evaluator: Identifying the extent of the impact of a training programme.
- Facilitator: Managing group discussion and group process.
- Coach: Helping an employee assess personal competencies, values, and goals.
- Writer: Preparing written learning and instructional materials.
- Instructor: Presenting information and directing structured learning experiences.
- Manager: Planning, organising, staffing and controlling training and development events.
- Marketer: Selling training and development viewpoints, programmes, and services.
- Media Specialist: Producing audio-visual materials for training.
- Analyst: Defining gaps between ideal and actual performance and specifying the cause of the gaps.
- Programme Administrator: Ensuring that the facilities, equipment, materials, participants are present and that the training event runs smoothly.
- Designer: Preparing objectives, defining content, and selecting and sequencing activities for specific training.
- Strategist: Developing long-range plans for training and development.
- Task Analyst: Identifying activities to attain specific results.
- Theoretician: Developing and testing theories of learning, training, and development.
- Transfer Agent: Helping individuals apply new related learning to their work.

Therefore, the role of a trainer is a highly complex, multi-faceted role, which draws on many skills.

Earlier, 'training' as a noun, was defined as a process of learning skills. Now let us consider the verb 'to train'. As a verb, to train someone means to instruct, to educate and / or to impart knowledge or skills. In fact, the word train may be seen as an umbrella term which encompasses all these terms and they are often interchangeable. In your work as a trainer, you will draw on many of the above roles as you go about your daily routines, often without realising that you are doing so.

The Responsibilities of a Trainer

As you stand in front of a training class, your trainees are looking to you to impart your knowledge, skills and experiences to them to enable them to do a better job, learn a new skill or complete a new task. They may be nervous or fearful, even resistant. On the other hand, the organisation has put its faith in you to deliver the training that meets both the needs of the trainees and of course, the needs of the organisation.

From the above, we have seen that training is about helping shape skills, knowledge and attitudes. A skilled trainer will help trainees improve their skills, their knowledge and may even help the trainees change or modify their attitudes. It is important then to have a closer look at these.

You have learned the skills, knowledge and attitudes that you have in various ways. Your parents and teachers helped you to read, socialise and communicate.

Some other things that you may have found out for yourself, or with the assistance of others, are:

- That fire has many uses. It can be dangerous and has to be respected;
- The rules of the road and how to drive safely and to maintain a car;
- How to play a sport, apply its rules, and be a good winner or a good loser.

You have, no doubt, received a lot of your preparation for your working life through formal education and training. Depending on your job, the amount of training you received may have been minimal. Maybe you were shown a procedure, told once how to do something and then you were thrown in at the deep end. On the other hand, you may have undertaken extensive training through an apprenticeship.

To sum up, you have gained the various skills, knowledge and attitudes which you hold through a combination of:

- Education.
- Training.
- Discovery.
- Experience.
- Interest.
- Motivation.
- Observation.
- Imitation.

- Socialisation.

It is important to emphasise that learning does not always have to be formal, or to take place at a certain time in your life. It is a life-long process which is very often informal. It relates to your job, your social life, your family and your personal interests.

We say that learning is concerned with skill, knowledge and attitude. The following definitions may help clarify these terms.

Skill is a developed aptitude or ability in a particular intellectual or physical field.

Knowledge is information which is specific and particular to a subject, enabling you to understand a subject to an acceptable level.

Attitude is an internal state which affects your choice of action towards some objects, persons or events

Attitudes play an essential role in determining behaviour:

- They affect judgement and perception of others;
- They influence speed and efficiency of learning;
- They help determine the groups with which we associate, the jobs we choose, and even our philosophy of life.

It is difficult to measure an attitude because people may not always behave in line with their attitudes. Social or organisational “norms” or conventions often influence how individuals act and may be at variance with their beliefs and attitudes.



Learning Activity:

For this Activity please complete the following:

1. Write down a list of new skills, knowledge or attitudes you have developed during the past five years.

2. For each example, note the answers to questions (a) and (b) below.
 - a. Why did you learn them?
(E.g. Self-improvement; Greater efficiency; Necessity; Interest; Better teamwork; Promotion prospects; Personal challenge; Qualifications; DIY; Job change.)
 - b. How did you learn them?
(E.g. Course: education and training; Listening to others and discussing topics; Home study; Imitation; Experience; 'Had a go at it'; 'Read about it'; Newspapers; Trial and error; Observation; Television; Radio.)

The Trainer as a Facilitator

We sometimes hear the expression that so and so is a “natural” trainer. This means that they make the training look easy. This section looks at the role of the trainer as a facilitator of learning. The word facilitate has its roots in the Latin word “facile” which means to make a process look easy.

We have seen that one of the roles of the trainer is to facilitate discussion and dialogue, but are training and facilitation really one and the same thing?

There can be little doubt that facilitation is something that the trainer does throughout delivery of any training session, but is facilitating a strategic planning session and teaching someone to do a task or learn a skill by using lectures, PowerPoint slides and other classroom techniques really one and the same thing?

There are however a number of common traits that both a facilitator and a trainer share. Both great facilitators and the best trainers:

- Help the group achieve specific outcomes through the use of active, participatory, participant-centred methods;
- Regularly evaluate the process in real time, and can measure how well the participants achieved the stated outcomes at the end of the process;
- Have made themselves familiar with the organisational culture and context in which they are working, and ensure the processes “fit” that culture;
- Stimulate dialogue and interaction between participants, not just between themselves and the participants

The table below looks at some of the principle points of difference between a facilitator and a trainer.

Great Facilitator	Great Trainer
Is not necessarily a content expert.	Is a content expert.
Is an expert in many forms of group process (including inter-and-intra-group conflict resolution, strategic planning, team building, etc.)	Is not necessarily expert in many forms of group process. Instead, continually develop new methods to help participants achieve specific learning outcomes.

<p>Often helps the group to define and verbalise its own outcomes (e.g. to solve a specific problem or develop a new procedure.)When outcomes are externally prescribed, helps the group develop, implement and “own” action steps to achieve the outcomes.</p>	<p>Most often in corporate, organisational or higher education settings, the trainer does not help each learner group establish its own learning outcomes. (That’s a whole other approach, called Popular Education.) However, the trainer may be involved in implementing and/or analyzing the results of training needs assessments. These should include input from representative (potential) participants as well as other stakeholders.</p>
<p>Sees facilitation as a process to help achieve specific “bits” of broad Organisational goals</p>	<p>Often focuses on training’s impact on actual, discrete job performance or tasks. Trainer may evaluate training’s effectiveness long after the training event takes place.</p>

Therefore, whilst the trainer sometimes uses the skills of facilitation, there can and should be a real distinction between the role of trainer and facilitator. The trainer may facilitate learning, encourage dialogue and discussion but in reality, the roles, whilst having some commonality of purpose, should be viewed as separate and distinct.

Line Management

Managers need to ensure that training meets the needs of the business.

In order for training to reach its full potential, managers must be strong advocates and vigorous champions of learning and skill improvement. The role of Line Management may be summarised as follows:

- To assist in getting Senior Management to 'buy in' to investing in relevant and effective training.
- To provide budgets to facilitate staff training.
- To assist in training needs analysis.
- To work with learners to help identify their training and development needs.
- To brief learners before training begins by outlining training goals.
- To provide staff with the necessary resources required to complete training.
- To support training programmes by showing support, discussing the importance of the issues being addressed, and outline expectations.
- To provide feedback to Trainers following training.

- Praise and/or reward employees who make strong contributions to the success of training sessions.

HR or Training Department

Training is a key role of the HR Department, alongside recruitment, performance management and operational HR activities (such as pensions, payroll etc.). The role of the HR or Training Department may be summarised as follows:

- Provision of advice to Line Management on learning in the workplace.
- Anticipating and identification of training needs.
- Development of training programmes including induction, skill development, career development, coaching and mentoring.
- Planning and organisation of training programmes.
- Development of linkages with training providers, colleges and specialist trainers.
- Quality assessment and control of training.
- Undertaking cost-benefit analysis of

The Learner

The role of the learner is key to the overall learning and development process. Without the willing and enthusiastic engagement of the learner, the transfer of skills will not occur. The role of the Learner may be summarised as follows:

- To work with their manager or mentor in identifying their training needs and develop plans which will address their training needs.
- To participate fully and positively during the learning process.
- To demonstrate their knowledge, skills and competence through a wide range of evidence including specific assessment tasks, activities, tests and examinations.
- To collaborate in peer assessment and provide meaningful feedback to the Trainer following training.
- To review their learning by reflection, setting learning goals and next steps through a personal learning plan.

Internal Assessor (IA)

The primary role of an Internal Assessor (IA) is to assess candidates' performance in a range of tasks and to ensure the evidence for the competence of knowledge-based skills submitted by

the candidate meets the requirements of the assessment criteria. In many cases, the IA is the same person as the trainer. Responsibilities include:

- Judging the evidence and making assessment decisions against the assessment criteria for competency and demonstration of knowledge requirements.
- Marking and grading.
- Confirming candidates have demonstrated competence / knowledge and completed the required documentation.

External Authenticator (EA)

The External Authenticator undertakes a similar role to an Internal Verifier but may report directly to the Awarding Body. Responsibilities include:

- Verifying the quality of the verification decisions made by the Internal Verifier.
- Reviewing a sample of each IVs work and each Internal Assessor's (IA) work to ensure IAs and IVs are using performance standards appropriately and consistently.
- Facilitating standardisation processes to ensure candidates, assessors and verifiers are working, assessing and verifying to consistent standards.



My Notes on Training and Development Roles

Factors that Influence the Need for Training and Development

Individual Training Needs

A considerable number of studies provide support for the many benefits of training for individuals and teams.

Skill development is an important goal for those who are both employed and unemployed. According to an Accenture survey in Ireland, 17% of people cite “lack of qualifications” as a barrier to re-employment while 16% cite their skills are “not required in the marketplace.”

Employees will rarely see the further development of their skills as something negative. Programmes and courses that are designed to enhance their work or personal life will be viewed positively. Benefits to the individual include factors that relate to performance directly (e.g. innovation and tacit skills, adaptive expertise, technical skills, self-management skills, cross-cultural adjustment) or indirectly (e.g. empowerment communication, planning, and task coordination in teams).

The most significant benefits of training to individuals are:

- Clarifies job duties and responsibilities.
- Develops new skills.
- Improves employability.
- Increases ability to do the job effectively and consistently.
- Provides the foundation for promotion and advancement.
- Assists in conducting an accurate performance appraisal.
- Produces higher levels of performance.
- Produces a stronger sense of loyalty and respect for the organisation.
- Improves motivation and morale.

Organisational Training Needs

Senge (2006) postulates that in the long run the only competitive advantage an organisation has is its ability to learn faster than its competitors. When an organisation encourages its employees to think, communicate and cooperate, it gains a competitive advantage. A learning organisation is one which fosters and enhances these activities for its members and members of the community in which it exists. This may be the benefit of its shareholders, investors, owners etc. and in the case of not-for-profit organisations, the benefits to the service users.

Traditional organisational change by reacting to events. Their ‘reference points’ are external and often based in the past or on the competition. They are often averse to change. Learning organisations, by contrast, are vision-led and creative. Their reference points are internal and anchored in the future they intend to create. They embrace change rather than merely react to it.

Why should organisations care about training? Because, the level of performance and improvement needed in today's ever-changing environment requires learning, lots of learning. In most industries and government, there is no clear path to success and no clear path to follow. As competitors can quickly copy products, services, and processes, an organisation that learns faster than its competitors has a distinct advantage.

Many employers provide training for the job around competencies, which will be beneficial to the company. In the current environment, these include teamwork, ethical judgment, intercultural skills, responsibility, reasoning, oral communication, self-knowledge, adaptability, critical thinking, writing, self-direction, and global knowledge. These needs may be driven by both internal and external factors.

The Internal factors that affect training are:

- The need to introduce staff members to internal policies and procedures.
- Help staff deal with and prepare for organisational change and the causes of the problems the organisation faces so that they can take part in deciding how the organisation should deal with the problems.
- The need to provide staff with the skills they need to undertake tasks effectively and efficiently (e.g. IT, customer service, sales, HR, manufacturing).
- To need to provide management and leaders with the skills they need to lead the organisation (e.g. planning, leadership, innovation, change, strategic planning)

The External Factors that affect training are:

- The need to train staff on new health and safety regulations (e.g. childcare, healthcare and manufacturing).
- The need to train staff on new legal requirements (e.g. data protection).
- The need to train staff on new technologies (e.g. word processing, digital marketing, etc.).

The most significant benefits of training to organisations are

- Clarifies job duties and responsibilities.
- Increases an individual's job competence.
- Provides the foundation for further development.

- Assists in conducting an accurate performance appraisal.
- Produces higher levels of performance.
- Enhances teamwork and team building.
- Produces a stronger sense of commitment to the organisation.
- Achieves higher levels of employee motivation.
- Assists in cross-training/job rotation.

So where does training sit in the organisation? We distinguished between the HR Department and Human Resource Development. In many organisations, the training function may sit within the HR Department, in others it may sit within the remit of Operations, but without doubt, the provision of on-going training and development is a significant cost to any organisation and as a trainer, you have a responsibility to your organisation to ensure that training is fit for purpose and that there is a return on investment.



My notes on Factors that Influence the Need for Training and Development

The Legal and Legislative Framework of Training

So far, we have explored to a degree, why organisations might choose to engage in the training process. This section will look at another reason why organisations might wish to train their members, - legal or legislative requirements. We will also briefly look at the role of the Irish State in the provision of training and consider training which is required by law.

There is little doubt that certain industries or professions require that its members undergo rigorous training before they are allowed to carry out duties. Most people would be reluctant to be treated by a Doctor who has not undertaken several years of formal training and instruction in the practice of medicine. In this example, there is clearly a legislative and indeed, a governing body requirement that individuals who wish to practice medicine, undertake years of training, both academic and professional practice, before being allowed to work unsupervised.

In Ireland, the Constitution of Ireland (1937) establishes the right of every child in the State to an education. However, it was not until Ireland's entry into the EEC in 1973 and after the publication of the Murphy and Kenny reports in the 1970's and 1980's respectively into further education and training, that there was serious attempt by the Irish State to become involved in the sector. Murtagh (2014) describes the Irish State's involvement in further education from the foundation of the Irish Free State in 1922 until the 70's and 80's as 'piecemeal'. Prior to this time, the only legislation which governed the area was the Industrial Training Act of 1967, which saw the establishment of ANCO, an agency of the Department of Labour. ANCO's role was to oversee the provision of training and development in industry. Its principle method of achieving this was through the payments of grants to organisations for the provision of workplace training. ANCO was replaced in 1987 by FÁS, literally translated from the Irish language as "grow".

FÁS had a wider remit than its predecessor, ANCO, and became responsible for employment services, employment schemes, employment advisory and of course, training and retraining. 1993 marked a further development, when the Department of Labour was amalgamated into the Department of Enterprise and Employment. Following on from a series of financial scandals, in 2011, the Minister for Education and Skills, announced that the role of FÁS in the provision of training would become a function of the Vocational Education Committees or VEC's and that a new organisation SOLAS would replace FÁS as the body responsible for public funding of training. In 2013, the VEC's were restructured as Education and Training Boards.

The introduction of the Health, Safety and Welfare at Work Acts (2005 and 2010), and subsequent Regulations and Orders under the Acts, placed formal and legal obligations on employers to carry out certain training for their employees. It is not proposed to go into details of all mandatory training requirements in this course, but, in your work as a trainer, you may be

required to design, run and indeed, possibly deliver, training which is a legal requirement in the workplace. Two examples are given below.

- The Safety, Health and Welfare at Work, (General Applications) Regulations 2007, Chapter 4, of Part 2, places a legal requirement on all employers, where lifting is required in the workplace to carry out Manual Handling Training. This training must be delivered by instructors/trainers who hold FETAC level 6 qualifications.
- The Safety, Health and Welfare at Work (General Applications) Regulations, 2007, Chapter 2, of Part 7 , imposes a requirement of all workplaces to have a trained Occupational First Aider in place and that refresher training is regularly conducted. This training can often be costly to provide.

Breaches of the Health, Safety and Welfare at Work Acts carry significant penalties and of course, failure to have people properly trained, can cause workplace accidents and loss to the organisation. The Health and Safety Authority (HSA) is the statutory body, which has wide-ranging powers to inspect organisational training records and also has the power to prosecute organisations, where negligence is found.

Why have we considered this? As training is a considerable cost for any organisation, some will invest in the legal or prescribed training before investing in other training. It is also important for you, as a trainer, to note that you may not always be qualified to deliver certain training and may have to bring in outside expertise. In your role as a trainer, you may be required to consider the legal requirements for delivery of training in the workplace and allocate training budgets accordingly, if appropriate, for mandatory training.



My notes on The Legal and Legislative Framework of Training

Barriers to Effective Training

Situational Barriers

Situational barriers arise from one's situation in life at a given time.

- **Organisational** — the organisation to which the learner belongs or is employed, may be a barrier to training. For example, many companies fail to see training as an investment, do not provide financial support or lack adequate information on the costs and benefits of training.
- **Measurement & cost** — measurable factors include, the cost of training to the company, time spent completing the course and the additional resources required. In most cases the benefits of the training are not measured accurately.
- **Communication**— it is crucial the learning and development team communicate with the organisation, most importantly on the training requirements, reporting the identification for the need for training, the benefits, and ultimately the consequences should the training not be uptaken.
- **Staff turnover**— training and development is the key to reducing staff turnover, training the staff keeps up motivation momentum whilst increasing their knowledge and developing their roles and responsibilities. A high turnover rate increases the risk of loss if investment in training.
- **Workload**— time spent training requires time and dedication aside from an existing workload, this may increase stress and, it is vital training design considers the learners workload.
- **Facilities**— a training needs analysis (which we will explore later) will identify the need for facilities such as off-site whereby there may be reduced interruptions, a change of location may induce a more focused training group.
- **Social** — those who experience particular barriers to participation in training, include adults with less than second level education, carers, long-term unemployed, lone parents, and people with disabilities. Socioeconomic status (SES) can also strongly influence student attitudes, values, background experiences and education success.
- **Cultural** — religious and cultural differences can sometimes lead to certain groups being discouraged from, or excluded from participating in educational and training opportunities.

- **Linguistic** — language barriers can be a particular difficulty for migrants, and international students, at all levels of education and training. This can reduce confidence, cause stress and suppress achievement of learning outcomes.
- **Financial** — this includes not having funds to pay for tuition fees, or related costs such as travel, and accommodation. It can also affect participation in training if learners have to experience a reduction in income, or unemployment support, in order to undertake training.
- **Time** — this could include not having the available time to complete training due to other commitments (e.g. work, family, social life etc.). Sometimes work commitments can hinder training.
- **Distance** — this could include physical distance from course providers or lack of transportation.
- **Availability**— the lack of availability of courses in some locations, e.g. rural areas can present a barrier to participation. This barrier may also indicate a lack of information about the course and programme offerings, which may be as much a function of the individual as of the training institution.

Individual Barriers

- **Learning style** — the concept of learning styles has been applied to a wide variety of learner attributes and differences. Some learners are comfortable with theories and abstractions; others feel much more at home with facts and observable phenomena; some prefer active learning and others lean toward introspection; some prefer the visual presentation of information and others prefer verbal explanations. One learning style is neither preferable nor inferior to another, but is simply different, with different characteristic strengths and weaknesses. A goal of instruction should be to equip the learner with the skills associated with every learning style category, regardless of the learners' personal preferences, since they will need all of those skills to function effectively as professionals.
- **Physical ability** —some students may also have serious physical, medical or sensory challenges that interfere with their learning. Usually, the physical and medical challenges are medical conditions or diseases that require on-going medical care. The sensory challenges are usually a loss either in hearing or in vision, or more rarely in both. The relationship between disability and education is complex. Those whose disability or illness dated from before the age of 25 got a poorer education; but so also,

to a lesser degree, did people whose illness or disability was acquired as an adult. This may be due to background factors, e.g. social class, which affect both education levels and health or disability risk.

- **Intellectual ability** — an intellectual disability is a significant limitation in a student’s cognitive functioning and daily adaptive behaviours. The student may have limited language or impaired speech and may not perform well academically. Compared to students with learning disabilities discussed earlier, students with intellectual disabilities have impairments to learning that are broader and more significant. They score poorly on standardised tests of intelligence. Everyday tasks that most people take for granted, like getting dressed or eating a meal may be possible, but they may also take more time and effort than usual
- **Learning Disability** — a learning disability (or LD) is a specific impairment of academic learning that interferes with a specific aspect of schoolwork, and that reduces a student’s academic performance significantly. A learning problem is not considered a learning disability if it stems from physical, sensory, or motor handicaps, or from generalised intellectual impairment (or mental retardation). It is also not an LD if the learning problem really reflects the challenges of learning English as a second language. Genuine LDs are the learning problems left over after these other possibilities are accounted for or excluded.
- **Cognition and learning** — there are a number of skills that students need in order to function in the classroom. These include literacy skills, numeracy skills, organisation, memory and comprehension. Some pupils have great difficulty in these areas and require access strategies that ensure that their difficulties do not prevent them from acquiring, generalising, and applying new knowledge and which promote self-confidence and self-esteem. Dyslexia is another example of a barrier to learning within the area of cognition and learning. It is a combination of strengths, often in artistic, spatial and creative thinking, and weaknesses which affect the acquisition of reading, spelling and writing skills and sometimes number and calculation. Learners with dyslexia may also have additional difficulties with short-term memory, organisation, sequencing, slow processing and motor coordination. It is a hidden disability, and because literacy skills are part of everyday classroom life, it can have a negative effect on pupil self-esteem.

Dispositional Barriers

Dispositional barriers involve attitudes and opinions towards learning, as well as perceptions of oneself as a learner.

- **Pre-training motivation** — pre-training motivation is an important factor in predicting the achievement of learning outcomes. People who have a positive disposition to learning are more likely to achieve learning outcomes with higher grades than those with lower learning goal orientation.
- **Attitudes** — whether someone is positively or negatively predisposed to a phenomenon has a direct effect on his or her likely behaviour. Those who have a positive attitude towards education and training in general, or the specific types of education and training available to them, are more likely to participate and also achieve learning outcomes. Most European citizens believe that further education is relevant: 82% say that people in vocational education and training acquire skills that are needed by employers.
- **The approach taken towards the programme of study** — learners may be inclined to approach their courses in one of three ways – reproducing, meaning and achieving. Those with a reproducing orientation tend to rely on rote memorization and mechanical formula substitution, making little or no effort to understand the material being taught. Those with a meaning orientation tend to adopt probing and questioning, and exploring the limits of applicability of new material. Those with an achieving orientation tend to do whatever is necessary to get the highest grade they can, taking a surface approach if that suffices, and a deep approach when necessary.



My notes on Barriers to Effective Training

Impact of Organisation Mission, Values, Vision and Strategy on Training

Mission Statements

“Before formulating a strategy, every organisation needs to agree on their company’s purpose (mission) and the internal compass that will guide its actions (values).”

The mission, vision and strategy represents the compass of the Company at the strategic level. It provides direction and clarity on where the team or company should be going and what is important on the journey.

It outlines the business aims, who the customers are, what their products and services are and what distinguishes their business from competitors. The training department must be fully conversant with these statements in order that it can subsequently produce a training plan which will facilitate their attainment. Close liaison in planning with managers responsible for those respective areas is essential.

What are the boundaries beyond which it will not venture? If you are planning to enter the restaurant business, will you provide sit-down or quick service? A casual or an upscale atmosphere? What type of food will you offer — Irish, Mexican, America or Italian? What geographic area will you serve — a local suburb, a shopping street, a business park, the business district or a regional town?

A Mission Statement is a phrase, paragraph, slogan or sentence used to encapsulate the purpose of an organisation. It is useful in communicating the essence of the organisation to staff, customers and other stakeholders.

The mission is a brief statement, typically one or two sentences, that defines why the organisation exists, especially what it offers to its customers and clients. The pharmaceutical firm Novartis presents a good example: “We want to discover, develop and successfully market innovative products to prevent and cure diseases, to ease suffering and to enhance the quality of life. We also want to provide a shareholder return that reflects outstanding performance and to adequately reward those who invest ideas and work in our company.” Jack Welch suggests, “A good mission statement not only describes what the company is in business to do but how they are going to succeed at it.” For example, “We are going to sell lots of chickens,” is not as effective as “we are going to sell lots of chickens by growing the largest free-range chickens and advertising their value to the industry.”

- Uplift staff, and inspire employees to work towards a common goal (see Starbucks example).

- Generate pride (see the LVMH example).
- Communicate a message to customers (see Ryanair example).

Mission statements should include the following:

- The type of customer the company is targeting.
- The competitive edge or difference that the company offers.
- The key strengths of the company.
- How success shall be measured.

Tips for creating an inspiring mission statement:

- **“Involve others”** – even if you are a small business owner, it helps to obtain other people’s suggestions for your mission statement. Being clear about organisational vision is not a trivial exercise and requires input from senior management.
- **“Brainstorm”** – get together with creative people you know. Different people within the same organisation will have different views about the organisations’ purpose. Hold a brainstorming session, but do not criticise ideas or ignore any suggestions during the brainstorming session in order to encourage all possible ideas.
- Use **“Expressive words”** – “the statement should create dynamic, visual images and inspire action. Use offbeat, colourful verbs and adjectives to spice up your statement. Don't hesitate to use words like sizzle, fun, outrageous and marvel to add zest.”
- Express **“thought–leadership”** for your industry – thought leadership is used to describe a person or brand that is recognised by their peers as an innovator. IKEA’s aim of high-quality design at low prices is an example of “thought–leadership.”

Mission statement examples

Coca-Cola

“To refresh the world...To inspire moments of optimism and happiness. To create value and make a difference.”

Spotify

“We want to connect millions of people with their favourite songs and create a service that people love to use. We believe music should be easily accessible and that listening to music will

make people live richer lives. We want to create a win-win situation for people who love listening to music and people who love creating music.”

Google

“To organise the world’s information and make it universally accessible and useful.”

Ryanair

“Ryanair’s objective is to firmly establish itself as Europe’s leading low-fares scheduled passenger airline through continued improvements and expanded offerings of its low-fares service.”

Values

In essence, your company values are the beliefs, philosophies, and principles that drive your business. They impact the employee experience you deliver as well as the relationship you develop with your customers, partners, and shareholders.

Many organizations post their core values in prominent places but put little effort into ensuring employee alignment with — or even awareness of — them. The relationship between practicing corporate values and improving performance surfaces frequently in research, yet many organizations fail to leverage its power.

Addressing the lack of knowledge of and alignment with core values is a much-needed learning and development (L&D) initiative. Training everyone in the organization on the company’s core values and how to apply them can change the culture, the bottom line and employee engagement. Building excitement for knowing and practicing the core values can pump up engagement, employee ownership, and accountability.

Examples of Company Values

Walt Disney

- No cynicism.
- Nurturing and promulgation of “wholesome American values.”
- Creativity, dreams and imagination.
- Fanatical attention to consistency and detail.
- Preservation and control of Disney magic.

Google

- Focus on the user and all else will follow.
- It's best to do one thing really, really well.
- Fast is better than slow.
- Democracy on the web works.
- You don't need to be at your desk to need an answer
- You can make money without doing evil.
- There's always more information out there.
- The need for information crosses all borders.
- You can be serious without a suit.
- Great just isn't good enough.

London Metropolitan Police

- Working together with all our citizens, all our partners, all our colleagues:
- We will have pride in delivering quality policing. There is no greater priority.
- We will build trust by listening and responding.
- We will respect and support each other and work as a team.
- We will learn from experience and find ways to be even better.
- We are one team – we all have a duty to play our part in making London safer.

Vision (Strategic Goals)

Any strategy must begin with a definition of the ends that the strategy is designed to achieve and also the timeframe for achieving it. "If you don't know where you are going, any road will get you there" is the appropriate maxim here.

The vision is a concise statement that defines the **mid-to long-term (3–10 year) goals of the organisation**. Common elements of Vision Statements include:

- **Profitability** — this tends to be the dominant performance measure for commercial western organisations.
- **Cash flow** — especially relevant for startups and fast-growing companies.
- **Service delivery** — this is particularly important for service organisations, public sector and not-for-profits.
- **Growth** — this may be the priority for companies launching new innovative products or who are entering new markets.
- **Customer satisfaction** — while this is the means to an end, it is a critical yardstick of success.

Kaplan and Norton outline three Criteria for writing Vision Statements:

-
1. **Stretch goal** — the goal should stretch the organisation and provide a ‘big’ ambition.
“The stretch goal in the vision statement should truly be a difficult reach for the company in its present position. The CEO has to take the lead here; indeed, one of the principal roles of an effective leader ... is to formulate a ‘big, hairy, audacious goal (BHAG)’ that challenges even well-performing organisations to become much better.”
 2. **Market focus** — the target market should be clearly outlined.
 3. **Timeline** — a timeline for completion should be included



My notes on the Impact of Organisation Mission, Values, Vision and Strategy on Training

The Adult Learner

Humans are not the only beings that learn (far from it), but it is likely that we learn faster and for longer periods of our lives than any other creature. From a baby's earliest day's right through adulthood, we continue learning and adapting to experience.

In this section we will consider how adults learn, and the involvement of key factors in learning such as motivation.

In your role as a trainer, it is important that you consider the main theories of learning, their application to how your trainees learn and also how you teach.

Earlier we saw that training is concerned with changing attitudes, knowledge and skills. Burns (1995, p. 99) 'conceives of learning as a relatively permanent change in behaviour where behaviour includes both observable activity and internal processes such as thinking, attitudes and emotions'.

- Learning is active, we are not the passive recipients of skills and knowledge.
- Learning is individual
- Learning is voluntary

There are many different types of learning. Consider the following;

- Using a computer
- Swimming
- Chairing meetings
- Being assertive
- Facts about global warming

Not all this 'learning' is quite the same thing. It covers a number of different processes. Do they have anything in common? They all involve a change but exactly what has changed is different in each case. In learning to swim you have acquired a new motor skill. In using a computer there is a combination of physical and mental skills. Chairing meetings requires mental and social skills and being assertive involves attitudinal and social skills. Facts about global warming involve new knowledge which may or may not be accepted depending on the individual.

Domain	Definition	Example
Verbal Information	Stating facts, principles, generalisations or describing organised bodies of knowledge	Labels and facts – colours of the rainbow, counties in Ireland Bodies of knowledge – learning theories, health and safety procedures
Intellectual Skills	Using discriminations, concepts, and rules to solve problems	Design and code a computer programme
Motor Skills	Executing body movements in coordinated fashion which require practice	Starting a car Swinging a tennis racket Dancing
Attitude	Choices we make to behave in certain ways, a personal course of action	Preferring fiction over non fiction Respond to all emails within 24 hours
Cognitive Strategy	Using ways to control one's thinking and learning processes, the way the individual remembers, and thinks	Determining how to remember a list of topics – use mnemonics

Kolb's Experiential Learning Cycle

The mental process involved in learning is active rather than passive. To understand this difference, think of the difference between studying a novel for its structure and plot, rather than just reading it to pass the time. You must be consciously involved and intellectually working when learning.

Effective learners need to go through a four-stage cycle, which helps to internalise learning. This cycle is referred to as the adult learning cycle. This was developed by David Kolb (1984) and further developed by Peter Honey and Alan Mumford (1986).

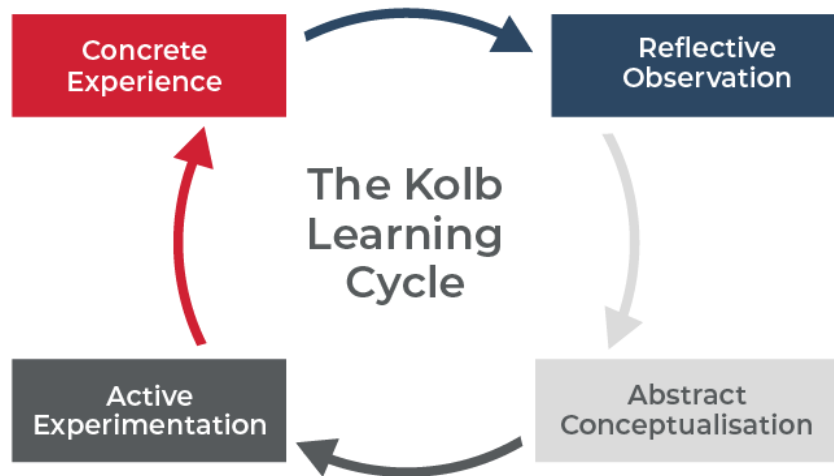


Figure 1.2 the Kolb Learning cycle

Concrete Experience

You must be conscious of what is happening. This is easy to see in a formal lesson, but it also happens informally when you become aware of information or acquire a new ability.

Reflective observation

You can review or reflect on your experience and develop ideas about it by:

- Thinking it through. Relate to yourself what you are doing or did, or what others said or did.
- Discussing your experience with others. For example, explore your feelings about it. Consider its implications.

Reflective observation is an active process because at this stage you are actually integrating new knowledge and concepts with those you already have.

Abstract Conceptualisation

Based on the ideas you have generated, you may come to some conclusions about the experience, or you may get some new insights. These conclusions are your own theories or concepts concerning this new piece of learning.

This phase also involves incorporating new knowledge into your existing system of beliefs. It may involve modifying some older beliefs.

Active Experimentation

In this final stage, you find opportunities to see if your new theories work. You plan how you will apply the learning and how you will test it.

When you carry out your plans, you have new experiences. This should lead to further review, conclusion and testing, and thus the process continues.

In structuring training for adult learners, it's important to incorporate all phases of the learning cycle to ensure that new information is relevant for the participants and they are given the opportunity to integrate the new information into the framework of their existing knowledge and experience. It is also important to consider individual learning styles. Each of us have developed different styles through experience and a preference for one or more learning styles.



My notes on Kolb's Experiential Learning Cycle

Honey and Mumford Learning Styles

Honey and Mumford learning styles were developed by Peter Honey and Alan Mumford in 1986. Their work is inspired from and built upon Kolb’s learning styles model (Leaver, 2005). However, they produced their own Learning Styles Questionnaire (LSQ) because it was found that Kolb’s LSI had low validity with managers.

Therefore instead of asking people directly how they learn, as Kolb’s LSI does, Honey and Mumford gave a questionnaire that probes general behavioural tendencies. The rationale behind this is that most people have never consciously considered how they really learn. And to be an effective learner, individuals must know about their learning styles or preferences and find ways to learn using those methods.



Figure 1.3 Honey and Mumford Model

The four learning Styles are:

Activists

Activists are those individuals who learn by doing. Activists need to get their hands filthy. They have a receptive way to deal with learning, including themselves completely and without inclination in new encounters. The learning activities can be brainstorming, problem solving, group discussion, puzzles, competitions, role-play etc

Reflectors

These individuals learn by watching and contemplating what happened. They may abstain from jumping in and prefer to watch from the sidelines. They want to remain back and see encounters from various alternate points of view, gathering information and using the opportunity to work towards a suitable conclusion. They like paired discussions, self-analysis questionnaires,

personality questionnaires, time out, observing activities, feedback from others. coaching, interviews etc.

Theorists

These learners get a kick out of the chance to comprehend the hypothesis behind the activities. They require models, ideas and truths with a specific end goal to participate in the learning procedure. Like to break down and integrate, drawing new data into a methodical and consistent 'hypothesis'. Their choice of learning activities includes models, statistics, stories, quotes, background information, applying concepts theoretically etc.

Pragmatists

These individuals have the capacity to perceive how to put the learning into practice in their present reality. Conceptual ideas and recreations are of constrained utility unless they can see an approach to put the concepts practically in their lives. Experimenting with new ideas, speculations and methods to check whether they work is their mode of action. They learn better through taking time to think about how to apply learning in reality, case studies, problem solving and discussion. What is important to take into account as a trainer is that in any group there will be people with a range of learning styles. This means that we need to adopt a wide range of training methods and activities in order to assist with learning.

Another key condition for effective learning is that it should be active. Active learning is learning based on intention and strategy. In other words, you have a clear idea of exactly what you are trying to achieve. If you only have a vague sense of your goals, the learning process is likely to become diffused and ineffective.

We learn different things at different stages of our lives, and there is a major branch of psychology – called developmental psychology – that is devoted to the way human beings learn and adapt to their environment at different stages in their lives.



Learning Activity;

Please complete the Honey and Mumford questionnaire in your materials, there is no time limit to this questionnaire. It should take you 10-15 minutes. The accuracy of the results depends on how honest you can be. There are no right or wrong answers. This is a helpful tool to distinguish your understanding, the questionnaire does not form part of your final assignments



My notes on Honey and Mumford Learning Styles

Adult Learning Theories

There are many theories which seek to explain how adults learn. They can be divided for simplicity into four main groups: behaviourist theories, cognitive theories, humanist theories and social learning theories.

Behaviourist theory

Reinforcement theory is largely derived from the work of Skinner (1938) and is one of the oldest theories of learning used as a way to explain behaviour and why we do what we do. The theory holds that the learner is basically passive, and we receive various stimuli from our environment which provoke a response.

Rewards are used to reinforce the behaviour you want and punishments are used to prevent the behaviour you do not want. The technical term for these processes is called operant conditioning. Learning is defined as a change in behaviour, which can be measured.

Positive rewards in the training room can range from a simple “well done, you are on the right track” to awards and certificates at the end of the training. Quite often the acquisition of positive reinforcement, leads individuals to be more motivated to learn or modify their behaviour. Negative reinforcement occurs when a negative consequence is withheld when the behaviour you desire is demonstrated, which increases the probability that the desired behaviour will continue.

The trainer’s role in this model is to design a learning environment which elicits desired behaviours and extinguishes others. Repeated practice, feedback and positive reinforcement are the key features of this approach. This is most practical when learning involves straightforward procedural and manual skills.

Advocates of this theory include: -

- John B. Watson - Watson’s Theory of Behaviourism
- B.F. Skinner – Operant Conditioning
- Ivan Pavlov - Pavlovian theory

Cognitive theories

Cognitive theories Replaced behaviorism in the 1960s as the dominant theory.

Cognitive theory suggests that the learner is an active participant in the process. They come to the table with their own skills, knowledge, memories and relevant information they’ve learned in the past. When learning something new, individuals process and construct their own understanding of a topic based on their past experiences and knowledge.

In this model the trainer must bear in mind that individuals relate to materials in different ways. Trainers can give each participant the best shot at success by:

- Sequencing your course content carefully
- Allowing learners the opportunity to play an active part in their own learning
- Emphasizing why the material is meaningful and how it relates back to their success.

Advocates of this theory include: -

- Jean Piaget, Cognitive Development
- Benjamin Bloom – Bloom’s Taxonomy
- Jerome Bruner - Constructivist Theory

Humanist theories

Humanist theories focus on learning from the perspective of the human potential for growth. Humanism emphasises how a person’s perceptions are centred in experience and that we strive to become all we are capable of becoming. Humanist learning theories stress the self-directedness of adults and the value of experience in the learning process.

Advocates of this theory include: -

- Carl Rogers – Client Centered Therapy
- Abraham Maslow – Hierarchy of Needs

Social learning theories

The Social Learning Theory of Albert Bandura proposes that People learn through observing others’ behavior, attitudes, and outcomes of those behaviors.

“Most human behavior is learned observationally through modeling: from observing others, one forms an idea of how new behaviors are performed, and on later occasions this coded information serves as a guide for action.” (Bandura).

Social learning theory explains human behavior in terms of continuous reciprocal interaction between cognitive, behavioral, and environmental influences..

Observational learning is influenced by the four processes of attention, memory, rehearsal and motivation. Before something can be learnt it must be attended to, information from observation then needs to be retained or stored in memory. It needs to be rehearsed and compared with the mental model of the observed behaviour, and finally the modelled behaviour is stored until an

individual is motivated to act upon it. Learning is solidly rooted in a social context. Social learning theory is relevant in on-the-job training and in behaviour modelling and multimedia training programmes.



My notes on Adult Learning Theories

Motivation Theory

Why do some learners engage in an activity when others seem to lack interest? How can you, as a trainer understand, predict and influence the activities that a learner may or may not engage in?

You need to understand how your learners are motivated. There are a range of theories of motivation that are applicable to training. The study of motivation has traditionally focused on attempts to identify the underlying physiological and psychological factors involved in the individual's desire to satisfy certain needs. We will consider this in more detail below, but basically this early need based approach sees individuals as possessing an intrinsic desire to grow and learn, and when in the right environment will be motivated to achieve their full potential.

Later theories, which came to be known as process or cognitive theories focused on the ways in which behaviour is initiated and goal directed. Such theories acknowledge the role of individual differences in behaviour and take into account the fact that people actively make plans for goal attainment. Research in education in this context has largely focused on the goals formulated to drive behaviour.

It follows that knowledge of both needs and goals is useful for the trainer in understanding the motivation of trainees.

Need theories of motivation

Needs can be conceptualised as the driving forces behind behaviour, a deficiency that a person is experiencing at any one point in time. Murray (1938) contended that human behaviour could be characterised by a specific set of needs. Maslow (1943, 1970) arranged needs in a hierarchical scheme.

At the base of his hierarchy were placed the innate biological needs, and at the apex, the abstract need for self –actualisation (see Figure 1.4). Maslow argued that higher needs only assume importance when lower needs are fulfilled. However, his theory is not specific about how individuals select and act on particular goals.

Need theories suggest that to motivate learning, trainers should be aware of trainee's needs and communicate how the training programme relates to need fulfilment. It is important also, to bear in mind, that if certain lower order needs are not met (such as if people are hungry, thirsty or uncomfortable) they are unlikely to be motivated to learn.

Individuals will also be unlikely to be motivated if they feel that the skills/knowledge being imparted will be of little use in assisting them in progressing in their current employment or in finding future employment.

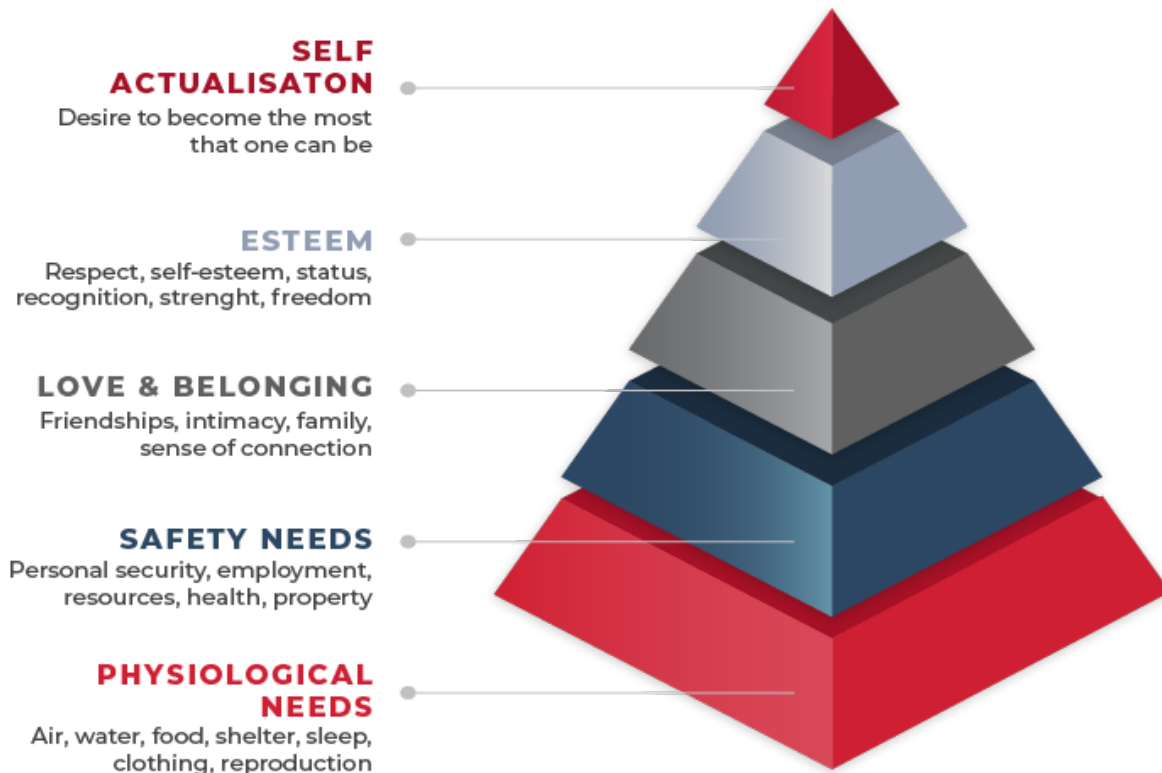


Figure 1.4 Maslow's Hierarchy of Needs

Herzberg (1968) developed Maslow's theory by dividing needs into two levels. Herzberg's theory is known as 'two-factor theory'. He investigated the factors in jobs which led to extreme satisfaction and extreme dissatisfaction. He found that factors which satisfy, or motivate, are quite different in character to those which dissatisfy.

According to Herzberg the factors which make people feel good about their jobs have to do with the work itself. He called this set of factors motivators. They include:

- Interesting work
- Career advancement
- Responsibility
- Achievement

He found that when people are dissatisfied with their jobs they are mainly concerned about the working environment. He called this set of factors hygiene factors. They include:

- Company policy
- Administration
- Supervision
- Working conditions
- Money

Motivators and hygiene factors are not opposite to each other. Correcting the hygiene factors removes dissatisfaction but does not motivate improved performance. Motivators also need to be present in order for there to be real satisfaction with work. Motivators permit an individual to grow (See Figure 1.6).

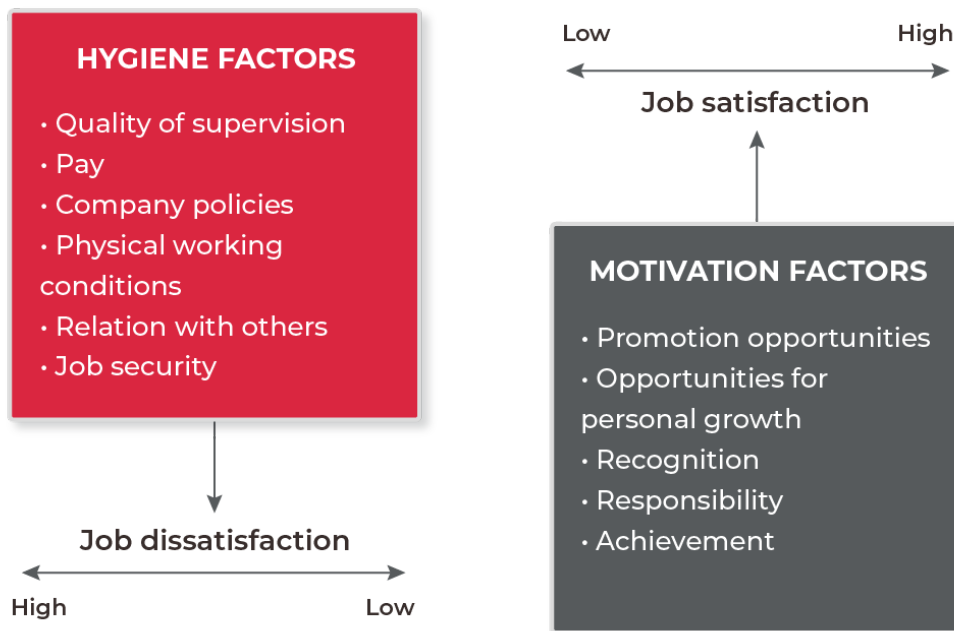


Figure 1.5 Herzberg Two Factor Theory



Learning Activity

Consider your motivation for doing this course. Use the box below to note what are your expectations and required outcomes?

What value do you place on these outcomes? Can you perceive any outcomes which might impact negatively on your motivation? What might the effects of these be?

Process/ cognitive theories of motivation

The conceptualisation of motivation in the form of drives and needs began to decline by the end of the 1950's, although these views remain popular in management theory. Cognitive and information processing theories which focused on the processes through which motivation influences behaviour and performance became the dominant view. These theories can be considered in terms of motives, cognitive choice and goals.

Goal setting theories

Goal theories refer to motivational mechanisms set into motion by the adoption of difficult goals.

Goals can influence behaviour by:

- Directing attention to the task.
- Mobilising effort to the task.
- Encourage persistence at the task.
- Facilitate the development of strategies designed to achieve the task (Locke and Latham, 1990).

Specific goals are more motivating than vague ones. Bandura (1991) found that an individual's tendency to set difficult goals depends on his / her perception of his / her ability. This is known as self efficacy and focuses on the beliefs that the individual has concerning their capability to perform the behaviours necessary to achieve the desired goal.

Goal setting theory can be used in the design of training programmes. It suggests that learning can be facilitated by providing participants with specific challenging goals and objectives. Information should be provided as to the expected actions the learner will demonstrate, conditions under which learning will occur and the level of performance that is acceptable.



My notes on the Motivation Theory

Systematic Training and Training Models

So far, we have looked at a definition of training, examined the role and responsibilities of the trainer and we have looked at some of the skills that a trainer needs to have in terms of facilitating learning and Adult Theories. We have also looked at the organisational imperative to train and where training ‘sits’ within the organisation.

When we looked at a definition of training, we said that training was an ‘organised’ activity. We also saw that the right mix of skills, knowledge and attitudes help employees perform tasks successfully. Organisations try to help their employees perform to a higher standard by investing in their training and development. However, this training does not just happen organically. It must be planned and implemented in a systematic way in order to ensure that it achieves its goal of improving performance.

Systematic Training

Systematic training is the planned and organised development of skill, knowledge and attitude required by an individual in order to perform a specified job or task to a given standard of performance. In systematic training, everything is planned in a logical step-by-step sequence. Figure 1.6 shows a diagrammatic representation of the systematic training cycle.¹



Figure 1.6 Systematic Training Cycle

¹ "Training & Development - Sunflower HR Ltd.." <https://www.sunflowerhr.com/training>. Accessed 29 Jun. 2020.



Learning Activity

Before reading ahead, use the box below to state what the steps in the systematic training cycle mean.

- Identify What?
- Design What?
- Deliver What?
- Evaluate What?

Step 1: Identify

Training should only take place as a result of an Identified Training Need (ITN).

A training need is defined as the difference between actual and required human performance in some specific area of operations, where improved training is the most economical way of eliminating the difference.

The following are some question you can ask about a job, in order to identify training needs and priorities:

Is there a real training need? As noted above, training is not the solution to all problems in an organisation. Sometimes new machinery, improved raw materials, better cost structures, or some other solution may be required. Is this job necessary or could it be discarded?

- What jobs need planned training?
- How many people need to be trained?
- What areas are most critical?
- What areas will provide the best results?
- What are the constraints?
- Will the training be cost-effective?

When you have answered all of these questions and satisfied yourself that the job is necessary, and that there is a real training need, you then carry out a process called job analysis.

Job analysis involves analysing the skills, knowledge and attitudes required by a jobholder, in order to identify what must be learned and how it will be learned.

You need to get the training requirements right and to specify them in exact terms.

Having looked at the job itself, you then look at the individuals to be trained. The following questions may help:

- What aptitudes and personal traits do they need to have?
- Will they be new recruits, or will someone from existing staff be retrained?

What is the difference between what they already know, and what they should know and be able to do as a result of the training?

So step 1, Identify, has its three stages:

1. Ask basic questions about the training needs.
2. Ask questions about the job, its component parts and the training required.
3. Select the people to be trained.

Step 2: Plan/ Design

Having identified the training need, you proceed to step 2, planning/designing the training.

First, you develop learning objectives, based on the job analysis. The objectives specify exactly what the learners should be able to do, and to what standard, when they have completed the training programme.

You then develop tests, since it is very important to assess learning progress and to check whether the objectives are being met.

You need to find out what learners know already, so that the training can start at the appropriate place. Find out about their interests and experience. Then decide on the sequence of training: what must be taught first, and what must wait until other things are known.

You then select your training methods. There is a range of methods available to you, depending on whether you are teaching motor skills, mental skills, attitudes, facts, and so on.

You can then consider where the training is to take place and the costs involved.

You then draw up a syllabus, with content designed to meet the training objectives. Lectures must be written up, discussion areas planned, and so forth. Do not leave anything to chance: the better the preparation the better the session.

Finally, if possible, have a trial run with a group of people who are similar to the target learners.

Step 3: Implement/ Deliver

The implement step involves actually enabling the learning to take place, using the methods identified in the planning step. Executing the training plan effectively as described to the identified learners. Items to consider for implementation are;

- Training aids chosen
- Purposeful facilities
- Pre-scheduled time and dates

- Clearing of any learning barriers within your power and ability

Step 4: Evaluate and Assess

After you implement the training, you need to ensure that the training was successful. This involves the following:

- Assess the learner. That is, check that the training has achieved the objective specified, and that the learner's performance has improved.
- Evaluate the training. That is, check whether the results have been achieved in the most economic and cost-effective way.



My notes on Systematic Training

Instructional Systems Design Models

In the previous section we considered a systematic approach to training. This training process is based on the principles of Instructional Design. Reiser and Dempsey (2012) see instructional design (ID) as a systematic process employed to develop education and training programmes in a consistent and reliable fashion. The application of ID models enables the creation of authentic, well-organised, and engaging materials.

The ADDIE Model

Although there are many system models, almost all are based on the generic analysis, design, develop, implement, and evaluate (ADDIE) model that evolved from instructional systems research following World War II, developed by Royce in 1970. The ADDIE Model has five phases - Analysis, Design, Development, Implementation and Evaluation.

The first 4 phases are sequential, and the last is conducted throughout the process. The analysis is important for defining the problem by clearly specifying the training needs that exist and developing them into useful information for the training professional.

The ADDIE process is an adaptation of the systems engineering process to problems of workplace training and instruction. It is a generic process traditionally used by instructional designers and training developers. The use of a systematic problem-solving approach is the common thread that underpins the model. At its best, the processes and products of the phases are continuously assessed for quality with emphasis on how well they meet the users' needs. Life-cycle evaluation ensures continuous improvement of the instruction.

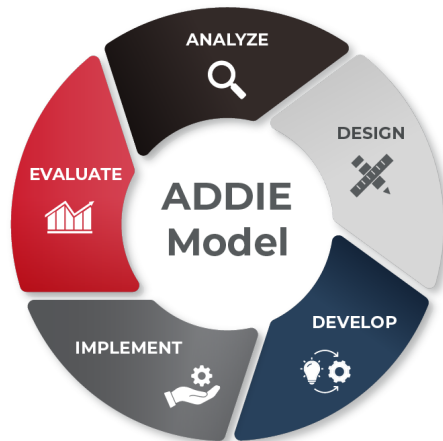


Figure 1.7 ADDIE Model

Analysis

In the first phase, the instructional aims and objectives of the course are established, and issues such as learner skill level are identified.

Some of the questions that might be addressed during the analysis phase are

1. Who will be trained? What is the minimum/maximum current knowledge of the trainees? What are their characteristics? What are their special needs?
2. What knowledge and skill deficiencies currently exist?
3. What are the tasks currently performed and what new skill level is required following the training?
4. What are the available delivery options and methods for transferring the new skills to the workplace?
5. What is the instructional setting; e.g. classroom, on-the-job, self study, etc?
6. How do these skills connect to the intended audience?
7. What is the timeline?
8. What are the programme constraints?
9. What is the cost?
10. How will performance be measured?

Typical Activities of this phase;

Activity	Primary Roles	Deliverables
Determine strategies for transferring skills to the workplace.	HR Manager. Training Manager.	Training Strategy.
Determine the tasks currently performed by target participants and level of performance required following the training.	Training Coordinator. Trainer.	Job Analysis.
Clarify training objectives.	Line Manager. HR Manager. Training Manager.	Training Objectives.

Estimate program design, development, implementation and evaluation costs. Estimate effort and schedule.	Training Coordinator. Trainer.	Training Scope Document.
Determine trainer selection criteria.	HR Manager. Training Manager.	Potential Vendors. Request for Tender.

Design

This phase is concerned with learning objectives, content and subject matter, lesson planning and media selection, assessment instruments and exercises. Typical issues to be considered include;

1. The knowledge level the learner must demonstrate prior to training.
2. The development of learning objectives for each topic/skill required
3. The identification, structuring and sequencing of the learning steps.
4. Development of assessments, evaluation methods, and data collection methods.
5. Implementation and evaluation costs, effort required and schedule.

Typical activities of this phase:

Activity	Primary Roles	Deliverables
Determine entry requirements and profile of participants.	Training Managers. Trainer. Accreditation Body.	Programme or Module Descriptor.
Determine programme content, structure, sequence, duration and pace.	Training Managers. Trainer. Accreditation Body.	
Decide mode of delivery.	Training Managers. Trainer. Accreditation Body.	

Specify type and nature of assessments.	Trainer. Accreditation Body.	
Determine program evaluation methodology, data collection methods, timing and reporting formats.	Training Managers. Trainer. Accreditation Body.	Quality Assurance Policy.
Define implementation and administration requirements.	Training Administrator. Training Coordinator.	

Development

In the development phase, course designers and developers create the content following the blueprints of the design phase. This includes creation of the content and learning materials as well as integration of any eLearning technologies.

During this phase, instructional developers also validate each unit and/or module of instruction, and it's associated instructional materials as they are developed. They correct any deficiencies that may be identified.

During this phase, the following need to be taken into account:-

1. List activities that will help the trainees learn..
2. Select the delivery method most appropriate to the learning group.
3. Develop and produce programme materials, aids and instructional courseware.
4. Combine the courseware into a smoothly transitioning presentation.
5. Validate the material and presentation to ensure it meets all goals and objectives.
6. Develop trainer guides, learner guides, job aids and participant resources as necessary.
7. Prepare coaches and mentors who will be assisting with the training.
8. Book venue, accommodations and travel arrangements.
9. Schedule participants.

Typical Activities of this phase;

Activity	Primary Roles	Deliverables
Develop session plans, and trainer guides.	Trainer.	Session plans. Trainer guides.
Develop learner resources.	Trainer.	Presentations. Handouts. Learner guides.
Develop technology infrastructure and software.	ELearning Specialists. IT Specialists.	Online Resources. Communications. Interactivity.
Develop assessments.	Internal Assessor. Accreditation Body. External Authenticator.	Assessment Briefs. Marking Sheets.
Develop project and program evaluation instruments.	Trainer.	Feedback surveys.

Implementation

The Implementation phase includes the testing of prototypes (with a targeted audience) and putting the product in full production.

This involves delivery of the training, providing learner supports, providing a summative and formative assessment. This phase also includes administrative activities, such as copying, scheduling facilities, taking attendance data, billing learners, etc.

Typical activities of this phase:

Activity	Primary Roles	Deliverables
Book venue, organise resources, schedule participants.	Training Administrator.	Logistics Plan. Participant List.

Conduct training sessions and provide access to resources.	Trainer.	Attendance forms. Logins.
Formative Feedback.	Trainer. Learner.	Feedback.
Conduct participant assessments.	Learner.	Completed Assessments.
Assessments are marked/graded.	Internal Assessor.	Completed Marking Sheets.
Assessments are Internally Verified.	Internal Verifier.	Internal Assessors Report.
Assessments are Externally Authenticated.	External Authenticator.	External Authenticators Report.
Collect participant feedback.	Trainer.	Feedback Forms.

Evaluation

The evaluation phase is ongoing throughout the process and should take place before, during and after the implementation of training. Its purpose is to ensure that all stated goals of the learning process will meet the specified needs. Another objective of this phase is to identify on-the-job performance following completion of the course

The evaluation phase consists of two parts: formative and summative.

1. **Formative evaluation** - this is the beta testing that takes place to help you smooth out your instruction. Even with all of your tedious and careful analysis, planning and reviewing, you have only created instruction that will theoretically work.
2. **Summative evaluation** – this consists of operational "dry runs" conducted as the last step of validation in the development phase.

The evaluation also includes reviews conducted to test the overall effectiveness of the training programme.

Typical Activities of this phase;

Activity	Primary Roles	Deliverables
Formative and Summative Evaluation.	Trainer. Training Administrator.	Evaluation Reports.
Review training course performance (number of employees trained, % participants passed and participant satisfaction).	Trainer. Training Administrator. HR Manager.	Programme Review.
Review Programme performance (cost, schedule, scope, stakeholder satisfaction, project team satisfaction).	Trainer. Training Manager. HR Manager. Line Managers.	Programme Improvement Plan.

You need to bear in mind that some training professionals argue that the ADDIE model is flawed for several reasons. Firstly, in actual organisations, the training design process rarely follows the neat, orderly, step-by-step approach of activities. Secondly providing detailed documentation of each activity found in the model, adds time and cost to developing a training programme.

Despite these criticisms, the ADDIE model can be considered as a set of general guidelines that trainers need to follow to ensure effective training.

Agile Learning Design

Agile Learning Design is another model which sits under the umbrella of Instructional Design but unlike the ADDIE model is based on speed, flexibility and collaboration. It is becoming widely used by organisations as an alternative to the ADDIE Model as it shortens timelines to develop content, particularly in industries/organisations in which rapid change is a way of life. The popularity of Agile Learning Design is based on its ability to prioritise speed over other considerations. This approach is also referred to as Rapid Content Development or RCD.

Agile Learning Design refers to any approach to content development that focuses on speed, flexibility and collaboration. The term evolved from the software development industry, in which

electronic content development (e.g. e-learning) has similar characteristics to Agile learning design.²

One of the fastest growing trends in the training field is the increased need by organisations for rapidly developed learning content. In today's highly competitive global marketplace, concepts such as "time-to-proficiency" have become high priorities for businesses everywhere.

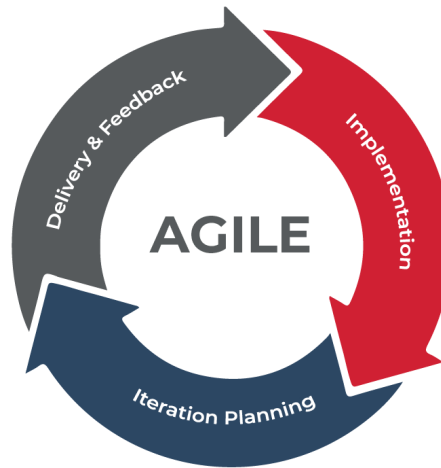


Figure 1.8 Agile Learning design

- **Implementation** - Is a form of project management that works in small increments and well suited to projects that could become irrelevant once delivered, especially useful in software development. The key to the agile plan is that it provides flexibility for changes to the product as it continues to be developed.³
- **Iteration Planning** - The purpose of the iteration planning is for the team to commit to the completion of a set of the highest-ranked product backlog items. This commitment defines the iteration backlog and is based on the team's velocity or capacity and the length of the iteration timebox.⁴
- **Delivery and Feedback** - Organisations that adopt Agile delivery practices can gain a competitive edge in a fast changing market. Businesses that empower teams to use Agile

² "Agile Learning Design - Training Industry." 10 Jul. 2013, <https://trainingindustry.com/wiki/professional-development/agile-learning-design/>. Accessed 30 Jun. 2020.

³ "Agile Implementation: Methodology & Strategy | Study.com." <https://study.com/academy/lesson/agile-implementation-methodology-strategy.html>. Accessed 2 Jul. 2020.

⁴ "Iteration Planning - Scaled Agile Framework." 20 Jan. 2020, <https://www.scaledagileframework.com/iteration-planning/>. Accessed 2 Jul. 2020.

development practices satisfy discerning customers and adapt to new technologies, helping them to develop the products that set the standard for industries.⁵

Frequent feedback is vital for Agile development teams to understand whether the team is going in the direction as expected.

The following are the benefits of early and frequent feedback:

- Breaking all the requirements in small pieces of individual work items will avoid mistakes that may be too costly to fix later.
- Customer availability for any questions to the team makes the product development robust, so that the team builds exactly what the customer wants.
- The team will be able to deliver at a constant and sustainable pace.
- Sharing agile productivity metrics helps the team to understand the gaps better so that they can find ways to improve themselves.⁶

The Differences Between ADDIE And Agile

As mentioned, there are quite a few differences in methodologies between the ADDIE and Agile models.

- ADDIE is a linear process while Agile brings each section to completion before repeating the process and developing the next course segment.
- Agile combines elements of the ADDIE model and implements them as two-week sprints.
- Agile is more flexible than ADDIE in that it allows everyone involved to contribute changes to each course section.
- In the ADDIE method, Instructional Designers work together with Subject Matter Experts (SMEs), project managers, and department managers to develop the full course before it reaches the learners.

⁵ "Agile delivery | GitLab." <https://about.gitlab.com/agile-delivery/>. Accessed 2 Jul. 2020.

⁶ "Why is Early and Frequent Feedback in Agile methodology" <http://tryqa.com/why-is-early-and-frequent-feedback-in-agile-methodology-important/>. Accessed 2 Jul. 2020.

- With Agile everyone is involved, including the learners, designers, SMEs, managers, clients, and stakeholders. Thus, efficient collaboration is a crucial element.
- Transparency is also an integral part of the Agile method, due to the frequent evaluations taking place at each stage. With ADDIE, evaluation happens at the end so transparency might only happen at the beginning of the process, if at all.

Combining The ADDIE And Agile Methodology

Depending on the project's scope, timeline, size, and content complexity, a mix of ADDIE and Agile methodologies might work best. If your project is large it might benefit from an ADDIE-style planning stage. After the initial planning, you can apply the Agile methodologies for each section of the course to refine and correct any content or implementation errors.

If time is of the essence, the Agile method might be more useful. The same applies if content creators are still working on the writing but you're asked to deploy the course faster. You can faithfully launch a prototype knowing that you can modify the process and content as you go.

Gagne and Merrill

ADDIE and AGILE are concerned with overall course design, whilst Gagne and Merrill are useful for designing individual lessons within training.

Gagne Nine Events of Instruction

Gagne, was an American educational psychologist. Gagne's theory is based upon cognitive theory and information processing.



Figure 1.9 Gagne 9 Domains of learning ⁷

Gagne (1972) identified nine main domains of learning as;

- Gain attention
- Inform learners of their objectives
- Stimulate recall of prior learning
- Present the stimulus
- Provide learning guidance
- Elicit performance
- Provide feedback
- Assess performance
- Enhance retention and transfer

⁷ "Gagne's Nine Events of Instruction"

<https://thepeakperformancecenter.com/business/learning/business-training/gagnes-nine-events-instruction/>.

Accessed 15 Jul. 2020.

Merrill's Principles of Instruction

Merrill is a professor of instructional design. Merrill identified five instructional design principles common to previous theories.

Merrill (2002) Identified five principles of Instructional Design

- Real world problems
- Activate
- Demonstrate
- Apply
- Integrate

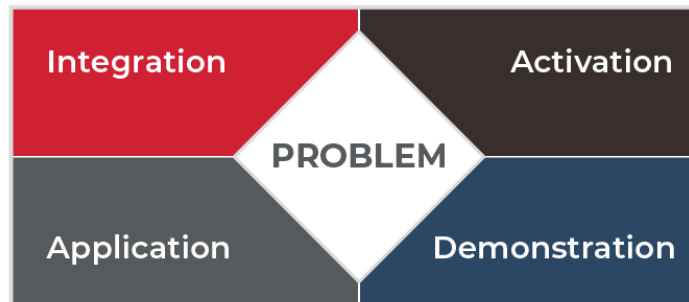


Figure 1.10 Merrill's Principles of Instruction



My notes on Instructional System Design

Training Needs Analysis

Before undertaking any form of training, it is good practice to conduct a Training Needs Analysis or TNA. The HR Guide defines Training Need Analysis as:

The process of identifying training needs in an organisation for the purpose of improving employee job performance.

So far we have learned that the goal of training is to bring about a relatively permanent change in knowledge, skills and attitudes. Before this can happen, it is necessary to know what current level of knowledge or skill is. We also learned that the identification of training needs is typically the first step in any form of instructional design.

Training can be costly both to design and deliver, therefore, it is often necessary to determine in the first instance if training is the appropriate intervention. A needs analysis is a useful tool to determine the gap between the current and desired individual and organisational performance.

For example, training may be the appropriate step, but equally, old or obsolete machinery or ways of working may also be a factor. In this example, if new machinery is needed, the problem may have been the obsolete machinery, however, once it is replaced, there may be a requirement to have employees trained to use the new machinery. Root cause analysis is a tool often used to diagnose problems. In the example above, the root cause was not a lack of training, but obsolete machinery; however, a needs analysis would also show that people may require training on the use of the new machinery.

A training needs analysis can take many forms and there is a wide variety of tools available to assist the trainer in this process, some freely available on-line; others can be quite costly. They all have similar characteristics. Whatever format the analysis takes it typically starts with the collection and documentation of the following issues:

1. Performance problems or issues;
2. Anticipated introduction of new machinery, tasks or technology;
3. A desire by the organisation to change: e.g. Introduction of new computer system or new markets for goods or services

In each case above the starting point is the need or desire to implement a change. Clearly, it is important to know how people will perceive the change and are they likely to resist change. Training may assist, but as we saw above may not be the only solution that has to be considered.

A key point to note here is that any form of training needs analysis should be conducted in a systematic way and based on a variety of information gathering techniques. It is typically conducted in stages, with one stage leading on from the next. Also, training needs analysis is not

to be considered a one-off event, the trainer should conduct regular need analysis to ensure that skills are kept up to date.

GAP Analysis

A GAP is a useful process to compare the actual performance or results with what was expected or desired.

In management literature, gap analysis involves the comparison of actual performance with potential or desired performance. If an organisation does not make the best use of current resources, or forgoes investment in capital or technology, it may produce or perform below an idealized potential. This concept is similar to an economy's production being below the production possibilities frontier.⁸

Gap analysis identifies gaps between the optimized allocation and integration of the inputs (resources), and the current allocation-level. This reveals areas that can be improved. Gap analysis involves determining, documenting and improving the difference between business requirements and current capabilities. Gap analysis naturally flows from benchmarking and from other assessments. Once the general expectation of performance in an industry is understood, it is possible to compare that expectation with the company's current level of performance. This comparison becomes the gap analysis. Such analysis can be performed at the strategic or at the operational level of an organisation.

A SWOT analysis;

- Strengths
- Weaknesses
- Opportunities
- Threats

⁸ "Gap analysis - Wikipedia." https://en.wikipedia.org/wiki/Gap_analysis. Accessed 15 Jul. 2020.



Figure 1.11 SWOT Analysis

A PESTEL analysis;

- Political
- Economical
- Social
- Technological
- Environmental
- Legal



Figure 1.12 PESTEL analysis



My notes on GAP Analysis

Methods of identifying training needs

The levels of a training need analysis stem from the organisation, the role and then a set of tasks.

1. Observation

In this approach, an employee’s performance itself is your source of information. You evaluate a worker’s performance through first-hand observation and analysis. To make this activity more productive, you can use a checklist to remind you of what to look for and take notes.

2. Interviews

Interviews should employ a written interview guide. The prime value of interview guides is that they ensure the same types of data from all individuals. Here is a sample: -

- Which aspects of your job do you enjoy the most?
- What would you change about your job if you could?

- What interests you least about your work?
- Which aspects of your work do you find most difficult?
- Have you sometimes found it difficult to do your job because of a lack of specific knowledge?
- What specific knowledge do you need to do your job?
- What training have you had?
- What training do you think would be useful in your present position?
- How do you know if you are doing a good job?
- When do you feel most pressured?

This allows you to determine whether a piece of information is one person’s opinion, or part of a widespread perception. Interviews allow you to meet individuals face to face to discuss their impressions of performance. Of course, you are also building rapport with people you may have to train at a later date.

There are various types of questions you can use. Some will have been prepared in advance; some may be constructed during the interview when further information is required.

Question Type	Example
OPEN – leaves the answer open for a person to answer	Tell me about... How do you see...
CLOSED – used to establish specific facts	Which machine? How long?
PROBING – fill in more details	You told me about an incident a few moments ago, can you describe exactly what led up to it, who was involved, what happened?
REFLECTIVE – repeat what has been said and encourage further disclosure, they show an awareness of feelings	You sound frustrated about how X upset you...?
COMPARISONS – you can follow up with probes	Which part of your job do you prefer most? Who is the best leader?

3. Difficulty Analysis

Job analysis is the process of describing the numerous duties that a worker must perform, Difficulty Analysis establishes which of their responsibilities or tasks cause the employee the greatest amount of problems and how this can be reduced through better training.

4. Focus Groups

A focus group is a form of qualitative research where a group of people are asked for their views or opinions. In a needs analysis, people who are currently doing a job can be asked to describe it. The use of focus groups can provide quick responses to the need analysis. The main advantage here is that people are involved in the process quite early on and feel that they have had an opportunity to participate and contribute.

5. Surveys

A questionnaire can take the form of a structured interview on paper or online. Questionnaires can be useful in obtaining a ‘big picture’ of what a large number of employees think while allowing everyone to feel that they have had an opportunity to participate in the needs analysis process.

There are three main types of questions used in surveys.

- **Open ended**
Describe the type of training that would be useful in your current job.

- **Multiple-choice**
Which best describes your perception of your current job with the organisation?
 - a. Excellent
 - b. Satisfactory
 - c. Unsatisfactory
 - d. Awful

- **Closed (Yes/No)**
Do you think training has improved over the last two years? Yes/No

6. Performance or Appraisal Reviews

This involves a discussion between the job holder and typically, their line manager to explore how they are performing in their current role and sometimes, whether the job description matches the work being carried out.

The performance or appraisal review process is often a useful place to obtain data about gaps in knowledge, skills or attitudes and provide the employee with the opportunity to highlight any gaps in their own knowledge.



Learning Activity

For this Activity, devise a short survey (6 questions) to be used as part of a training needs analysis. Use a mixture of closed, open and multiple choice questions.



My notes on Methods of Identifying Training

The Steps in a Training Needs Analysis

1. **Organisation analysis** — this phase determines where training can and should be used within the organisation. The output at this stage will be an Organisation Training Plan, which will list the department/roles, key issues affecting training, and training priorities.
2. **Job analysis** — this analysis involves the systematic design of job roles in the organisation. The output at this stage will be a Job Description, which will list the purpose, scope and duties/responsibilities of each job role.
3. **Task analysis** — the purpose here is to determine skills required to do the job. The output at this stage is a list of the knowledge, skills, competencies and attitudes necessary for each job.
4. **Individual skills audit** — the objective of this analysis is to review the skills of an employee, against the Task Analysis. This will identify 'training gaps'. The output at this stage is a Skills Audit.
5. **Learning outcomes** — the final stage of training needs analysis is to devise a set of learning outcomes, which will fill the 'training gaps'.

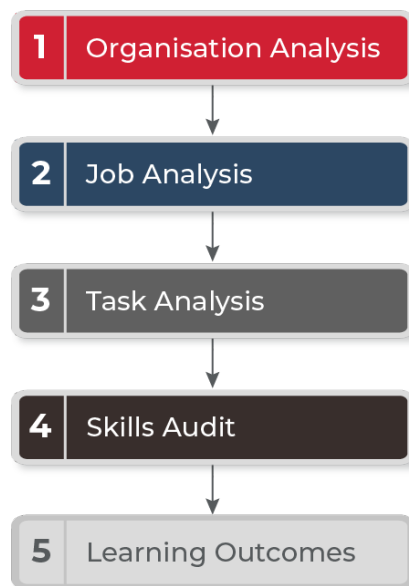


Figure 1.13 Steps in a Training Needs Analysis

Organisation analysis

The organisational analysis examines where training is needed and under what conditions the training will be conducted. It identifies the knowledge, skills and abilities that employees will need for the future, as the organisation and their jobs evolve or change.

Sources of information for organisational analysis include:

- **Data / MIS** — identification of departments or divisions with high turnover, morale problems, high rates of absenteeism, poor performance or other problems.
- **Current needs** — performance review and skills audits may identify training needs of new staff, supervisors, managers and executives.
- **Performance appraisals** — identified training needs or employee requests for training.
- **Future skill needs** — for example, installation of new technology, new product launches or new procedures.
- **Changes in the labour pool** — organisations have to plan for adjustment as the labour pool changes. As more women, minorities, immigrants and older workers join the workforce, employers must plan how to accommodate employees' diverse needs and still get the job accomplished.
- **Changes in laws** — laws and regulations may dictate training needs.
- **Employee relations/organisational problems** — employee grievances, customer complaints, quality control issues, accident records, performance problems, production problems, safety problems and audit deficiencies may also be sources of identifying training needs.

The output at this stage will be an Organisation Training Plan, which will list the department/roles, key issues affecting training and training priorities.

Job Analysis

Job analysis involves the systematic design of roles in the organisation. The output at this stage will be a Job Specification/Description, which will list the purpose, scope and duties/responsibilities of each job role. In addition, a Job Description also includes to whom the

position reports, the main purpose, scope and duties of the job. The metrics associated with the role may also be included. This is a list of the primary measures used to determine success in the role.

At the most basic level, the job description serves as a guide to the employee and sets out the main purpose of the job, where it is situated in the organisation, the level within the organisation, the most important accountabilities and responsibilities and the principle duties or tasks expected of the role holder.

Many job descriptions also set out the minimum educational qualifications needed to do the job and also the minimum skills level required. This is also referred to as the person specification and can be included in the job description or may be a separate document, which is typically read in conjunction with the job description.

The principle components of any Job Description include:

- Job title
- Department in which the jobholder works.
- The title of the person to whom the jobholder reports.
- The overall purpose of the job.
- A list of the major tasks of the job.

SPORTS CENTRAL SALES ASSISTANT JOB DESCRIPTION	
LOCATION:	Funtown store
DEPARTMENT:	Rugby Products
RELATIONSHIP:	Reports to Department Manager Supervise two casuals
JOB PURPOSE:	To provide customer service in accordance with store policies and procedures and thus achieve sales targets
PRIMARY DUTIES:	<ul style="list-style-type: none"> • Customer service and sales • Operation of Point of Sale • Stock ordering and replenishment • Housekeeping • Ensuring POS paperwork accurate and up to date, including banking duties • Merchandise display • Open and close store according to roster
OTHER DUTIES:	<ul style="list-style-type: none"> • Act in managers role if required • Liaise with sales representatives • Train part time staff as required

Figure 1.14 Job Description Example⁹

A Job Description can be used to help conduct a Job analysis which is the process of determining the elements or components of a job.

⁹ "Index - TAFE NSW Sydney eLearning Moodle."

https://sielearning.tafensw.edu.au/toolboxes/Cert4Retail/Retail%20toolbox%20site/index.htm?unit_rs/concepts/rsc_0201.htm. Accessed 29 Jun. 2020.



Learning Activity

The following is the start of a job description for an invoice clerk. For this Activity please complete the job description.

Job title: Invoice Clerk

Responsible to: Senior Clerk

Purpose: To deal with all invoices, purchase orders and credit notes.

Prepare a list of the tasks which you believe the invoice clerk will need to perform, based on the job purpose set out above.

Task Analysis

The purpose here is to determine the knowledge, skills and attitude required to do the job. This involves listing the responsibilities and determining the required knowledge, skills and attitude for each item.

Once you have analysed a job into its various tasks, competencies and knowledge required you can construct a skill matrix in which the various elements are presented. Training needs can then be determined.

SPORTS CENTRAL SALES ASSISTANT JOB SPECIFICATION	
QUALIFICATIONS:	<ul style="list-style-type: none"> • Certificate II in Retail Operations, perhaps commenced Certificate III • Drivers licence
EXPERIENCE:	<ul style="list-style-type: none"> • Worked in retail industry preferably in mid sized store store • Some knowledge of rugby associated sporting goods • Supervision of small work team • Used POS terminal
AREAS OF EXPERTISE:	<ul style="list-style-type: none"> • Sales experience • Product knowledge • Knowledge of stock ordering • Knowledge of basic principles of display and presentation • Knowledge of housekeeping duties
OTHER QUALITIES:	<ul style="list-style-type: none"> • Prepared to learn banking • Prepared to learn store security procedures • Ability to work unsupervised • Prepared to learn and assist in store paperwork such as sales journals • Some ability to train other staff • Punctual • Ability to negotiate

Figure 1.15 Job Specification¹⁰

¹⁰ "Index - TAFE NSW Sydney eLearning Moodle."

https://sielearning.tafensw.edu.au/toolboxes/Cert4Retail/Retail%20toolbox%20site/index.htm?unit_rs/concepts/rsc_0201.htm. Accessed 29 Jun. 2020.

Skills Audit

The purpose of the Skills Audit is to rate an individual’s skill levels across a predetermined skill-set. The purpose is to identify areas where there are gaps between what is required to do the job and the actual skill level of the individual.

Using information or data from an employee's performance review in determining training programme needs is the most common method of analysis. Employees can also be surveyed, interviewed or tested to determine their training needs. They can indicate problems they have or provide recommendations to solve problems. These interviews can be conducted on an individual basis or in a group setting.

Guidelines for completing a skills audit

- It is based on the Knowledge, Skills and Attitudes in the Task Analysis for the Job Role. Note that the term 'skill' in 'skills audit' is used in broad terms and comprises Knowledge, Skills and Attitudes.
- It may be useful to provide staff with the facility to complete the audit themselves and then compare their results to their manager’s results.
- Include a rating scheme (this allows for greater clarity about where gaps exist and allow skills to be tracked over time). A possible rating scheme is: (1) exceeds expectations, (2) meets expectations, and (3) below expectations. However, there are many other rating methods that can be used, e.g. a scoring system out of 10 for each item.

Knowledge	Skill	Attitude
Sales techniques	Complaints handling	Work well with others
Customer tracking system knowledge	Clear, concise communication	Friendly and polite
Phone system operation	Time management	Adaptable and flexible
Timekeeping system operation	Resilience	Patient and understanding

Figure 1.16 Example of Skills Audit



My notes on the Steps in a Training Needs Analysis

Aims, Objectives and Outcomes

The terms aims, objectives and outcomes seem to be similar and are often used interchangeably. However in practice there is a clear and important difference between them.

The term aim is used to describe what you intend to achieve in the overall course.

For example,

“To equip the learner with the knowledge, skill and competence to identify training and development needs at an organisation and/or individual level, to devise a training plan and to explore the scope of training and development design to meet those needs.”

Learning objectives are “the essence of your aim”. A learning objective describes, in specific and measurable terms, specific elements that learners will have mastered upon completion of the course. Aims are broad and help you focus on the big picture, however, your learning objective should be much more specific.

For example,

1. *To understand the internal and external environmental factors that can influence training and development*
2. *To understand the stages of learning and how to apply them*
3. *To know how to gather and analyse Training Needs Data*
4. *To be competent in drawing up/ compiling a Training Needs Analysis Report*
5. *To understand the Instructional Design Models and know how to use them when designing a programme*
6. *To know the step by step approach to designing a Training Programme*
7. *To know how to design and present training handouts /notes /manuals*

A well written outcome should tell you exactly what your learner will be able to do at the end of the training. It should specify the conditions under which the trainees will be able to demonstrate their learning and the standards that must be reached to show competence and thus achieve the aim.

Outcomes that are well written and specific will assist you in deciding on your training methods, and can be used as a means to evaluate the training.

For example,

1. *Define the differences between Learning, Training, Development, and Education.*
2. *Identify and examine the internal and external environmental factors, organisational factors and barriers to effective training that can impact training in an organisation.*

3. *Discuss the rationale and benefits of conducting a TNA at an Organisational, Job, and Individual level.*
4. *Assess a range of approaches to conducting a TNA and select the appropriate approach for a given situation*
5. *Conduct a Training Needs Analysis*
6. *Assess a range of Instructional System Design models and select the appropriate model to apply for a given situation*
7. *Design an effective Training Programme and materials that incorporates a range of design factors including cost, KSA requirements, learner needs, adult learning theory, motivation theory, environmental and organisational considerations*

SMART Outcomes

A good learning outcome has five qualities. As a memory aid we can use the mnemonic SMART.

Specific It should relate to a definite action.

Measurable It should describe the quality or quantity required.

Achievable It should be possible to achieve.

Relevant It should refer to the actual performance required and to the needs of the learner and the organisation

Timed It should be completed at, or within, a specified time.

An outcome that meets all of these criteria will state precisely what the learner will be able to do at the end of the lesson, and you will know what you need to include in your lesson. It is possible then, to tie the objectives into the learning outcomes.

Structure of Learning Outcomes

A complete learning outcome will have three main parts – performance, conditions and standards.

Performance Precise description of the activity required.

Conditions The resources that will be available or the restrictions that will be imposed.

Standards How well, how many, or within what time limit, the activity will be completed.

Your outcomes should be expressed in observable, measurable terms. In this way you avoid any unclear expectations in your learners. You should describe the required performance in words which are not open to misinterpretation.

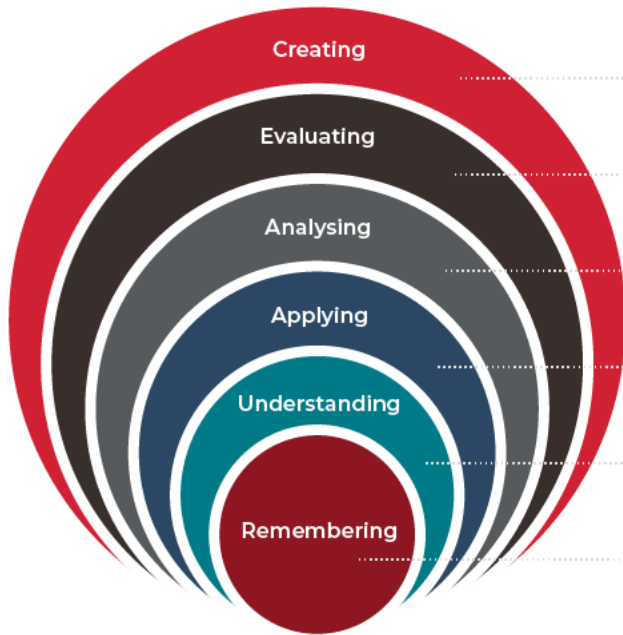
Writing Learning Outcomes

Performance statements outline what a trainee needs to know in order to perform a task. The first step when writing learning outcomes is to identify precisely what the trainee will be expected to do at the end of the training.

You will use the information obtained from job analysis and the job description when writing performance statements. We can break the learning needs down into knowledge, skills and attitudes.

Bloom's taxonomy is a set of six hierarchical models used to classify educational learning objectives into levels of complexity and specificity. The six models cover the learning objectives in cognitive, affective and sensory domains.

BLOOM'S TAXONOMY (Revised)



Level 6	Can the learner create a new product or point of view?	assemble, construct, create, design, develop, formulate, write
Level 5	Can the learner justify a stand or decision?	appraise, argue, defend, judge, select, support, value, evaluate
Level 4	Can the learner distinguish between different parts?	appraise, compare, contrast, test, differentiate, examine, criticise, discriminate, distinguish, experiment, question
Level 3	Can the learner use information in a new way?	choose, demonstrate, dramatise, employ, illustrate, interpret, use, operate, write, schedule, sketch, solve
Level 2	Can the learner explain ideas or concepts?	classify, describe, discuss, explain, identify, locate, report, recognise, select, translate, paraphrase
Level 1	Can the learner recall or remember the information?	define, duplicate, list, memorise, recall, repeat, state

Figure 1.17

The table below describes the main learning domains (Bloom, 1966) and the action words associated with them, which establish the criteria for measurement of performance.

Main Learning Domains	Associated Action Words	Measurement of Performance
Cognitive Domain (Knowledge)	Recall or recognise information	Define, list, identify, distinguish, summarise, paraphrase
	Understanding	Explain in own words, describe, demonstrate
	Application	Apply, relate, organise, employ
	Analysis	Compare/contrast
	Synthesis	Design, predict, develop
	Evaluation	Evaluate, test, argue

Psychomotor (Skill)	Physical movement, coordination and use of motor skill areas. Dexterity	Development of these skills requires practice and is measure in terms of speed, precision, distance, procedures, or techniques in execution
Affective (Attitude)	Attitude towards and appreciation of, subject	Show sensitivity to accept responsibility for, Be willing to demonstrate commitment to...

When designing training programmes it is important to think about these three domains of learning and their subcategories and develop learning outcomes that address each domain. This results in more holistic and comprehensive training.

Attention should also be paid to the conditions under which the training should occur. How far should the conditions of the job be replicated in training?

The more realistic the conditions are the more expensive and time consuming training is likely to be. Realism in practice is very important in certain jobs such as airline pilots and medical professionals, but the need for realism needs to be balanced against the nature of the performance being trained.

Consider call centre training in telephone techniques – some very basic training can be achieved by placing two people either side of a screen.

In summary, learning outcomes should be written in three parts:

- a measurable verb,
- the conditions (if any) under which the performance is to occur, and
- a criterion of acceptable performance (standard).

Learning outcomes

- Prevent teaching too much or too little
- Provide guidelines for course design
- Clarify goals
- Provide the basis for evaluation
- Provide a link between training needs and the training which is delivered so that training can be validated

- Provide the first point of reference for any review of training and training policy.



Learning Activity

Consider these examples of learning outcomes

1. Using a spell checker in Microsoft Word and have no more than one error per 1000 words.
2. Without reference to a colour chart, name correctly the primary colours and state which of the primaries should be mixed in order to obtain a specific secondary colour.
3. After training, the operative will be able to use the press to make 100 units in less than 2 minutes.

Use the box below to note

- What would you consider to be the 'specific' action in Example 1?
- State the conditions in Example 2.
- What is 'measurable' in the statement in Example 3



My notes for the Aims Objectives and Outcomes

Planning & Designing Training Programmes

At this stage, a programme is designed to meet the needs of the Organisation, target Learner Group and the desired Learning Outcomes, which have already been defined.

Designing a Training Plan

An organisational training plan is the result of a completed Organisation analysis providing you with vital information and key areas to focus specific training. This organisational plan should identify the training that learners are expected to complete over a stated period of time. Each training plan pertains to a single company or learning environment and can be designed to meet one or more high-level learning objectives.

A successful organisational training plan should include the following items;

- **Overview** - A summary specifically surrounding the gaps identified and the expected end result following the successful execution of the Organisational Training Plan
- **Introduction** - This section provides a management summary of the entire plan. It is not required to provide information in this section if the descriptions provided in the subsequent sections are sufficient.
- **Background and scope** - This section provides a brief description of the project from a management perspective. It identifies the tile system, its purpose, and its intended users. This section also provides a high-level summary of the Training Plan and its scope.
- **Points of contact** - This section provides the organisation name and title of key points of contact responsible for overseeing the success of each stage of the Organisational training Plan.
- **Document Reference** - Include the basis for document control and location of relevant documents related to the Plan and where the training materials will be stored and accessibility.
- **Security** - If applicable i.e consideration for sensitive information, relative security controls and permissions to staff can be listed here
- **Training Methodology** - Outline the proposed method for learning i.e eLearning, scheduled offsite/onsite training, plan of use

-
- **Course administration** - Outline the process for enrollment for each learner
 - **Resources and facilities** - Details resources required to deliver the training i.e flip boards, internet connections, overhead projector, off site location services, printable/electronic course materials. It is important to also include resources required for each learner i.e laptop/tablet
 - **Timetable and Schedule** - List the expected course duration allowing time for recreational breaks, exercises and activities. It is also important to include any additional research and investigative time the learner will need to dedicate.
 - **Course curriculum** - This section provides descriptions of the components that make up each course. If a large number of courses or modules is described, place these descriptions in an appendix. Subsections of this section, if any should be created for each course.



Learning Activity:

For this activity consider any task or job with which you are familiar and design a Training Programme Outline under the following headings

1. Training Aims and Objectives
2. Learning Outcomes
3. Outline Training Plan
4. Training Duration and Timetable
5. Training Methods/ Approach
6. Evaluation and Certification Methods
7. Records
8. Target Trainee Profile
9. Trainer/ Instructor /Workplace Supervisor Profile
10. Training Facilities

Training Delivery Methods

These are the cornerstone of the trainer’s tool kit. They can, however, be a source of difficulty. The sheer number and variety of techniques available make it difficult to decide which method to choose. As a result trainers may rely solely on one method if they are comfortable with it or it has become their favourite.



Learning Activity

For this Activity please list all of the delivery methods you have experienced and give two advantages and two disadvantages of each, based on your own experience.

Choosing the Correct Method

As a trainer you should be familiar with all training methods, so you can select the best method for any training you deliver. A key decision for the Trainer is to select the correct training method for the situation. More than one training method may be applicable. Personal preference does have a role in the selection of a method; however it should be a less important consideration than some other factors. Make your selection based on the following three factors:

1. Satisfying the learning outcomes

- **Number and location of trainees**

The number and location of trainees can indicate which training method is best. For a small number of trainees (less than 100) in a few locations (four or less), instructor-led classroom training is usually the most cost-effective delivery option. For a large number of trainees (100 or more) in varied locations (five or more), on-line self-directed or online group training is usually the most cost-effective option.

- **Length of training and travel requirements**

If trainees must travel and the training is more than one day, then distributed training, such as online self-directed training or “Distributed Group Training,” is usually the most cost-effective training delivery option. Distributed Group Training is a method used to deliver training to smaller groups across geographic areas.

- **Amount of time for training development**

If the training needs to be completed over a short period, say 1 or 2 days, then instructor-led training may be the quickest and most effective.

- **Amount of time for training delivery and equipment available**

Ensure that the training can be provided within the allotted time, with the equipment available. E.g., consider resource requirements such as workstations, lab facilities, etc.

2. Meeting the needs of the learners

- **Determine preferred learning Style**

Determine the preferred learning style (e.g. group learning or independent). Group training, such as instructor-led classroom training or distributed group training is the best training method for a group learning style. Individual training, such as CBT, on-the-job coaching or individual continuous improvement instruction, are the best training methods for an independent learning style.

- **Evaluate the customer experience**

Determine if the customer has had previous experience with a particular method. If the customer had a bad experience with a particular method, then it is likely they will want to avoid this approach. If customers have had a positive experience with a particular method, they will likely prefer that method.

- **Consider specific needs and content**

Determine the specific needs and content when selecting the appropriate training method.

- If group interaction is important, instructor-led training in a classroom or group training are more appropriate.
- If training is individual but human interaction, such as feedback from an individual, is important, then on-the-job coaching or individual continuous improvement instruction are the best options.
- If visual contact is important, use instructor-led classroom training, video conferencing or video/online training.
- If collaborative activities are required, then instructor-led classroom or online group training are the best options.

3. The Cost

- **Determine content stability**

If training content is subject to frequent change, it is easy to modify the content for classroom training or on-the-job coaching. Web-based training information is less easy to change.

- **Determine the number of trainees**

The major cost for online self-directed training is in the development of the training. The major cost for classroom training is the delivery of the training. For online self-directed training, the cost per student decreases as the number of trainees increases. If a large number of employees must be trained, on-line self-directed training is likely more cost-effective.

- **Evaluate amount of existing equipment**

Identify existing equipment that can be used for development and delivery of the training. For example, if a company already has an intranet, then web-based training may be a

more viable approach.

- **Cost-benefit analysis**

Cost-benefit analysis is calculated by comparing the total benefit to the total cost.

- **Total benefit** —this is the estimated additional income, which accrues to the organisation from running the programme. Financial benefits of the programme may be reduced costs or increased revenues directly attributable to the training. In many cases, however, benefits can only be estimated.
- **Total cost** — this is the total cost associated with the programme including needs assessment, design, development, delivery, assessment, administration and follow-up.
- **Net benefit** — subtract the total cost from the total benefit to find the Net Benefit of the training programme. A programme may be considered to be a financial success if the costs are lower than the benefits (i.e. Net Benefit is greater than zero).
- **Return on investment** — this is 'net benefit' expressed as a percentage of 'total cost'.

Example;

€ value for program benefits

€ value for program costs

(Program benefits ÷ program costs) x 100

$(75 \div 100) \times 100 = \text{€}75$ return for every €100 spent

$(500 \div 100) \times 100 = \text{€}500$ return for every €100 spent

The Lecture

A lecture is a form of one-way communication, which usually involves the transfer of information from one person, the lecturer, to a group.

The information is presented in a sequence, leading to a conclusion. Interaction may take place, but, generally, it is confined and limited to asking questions at the end of the lecture.

Lectures can consist of reading, word-for-word, from a prepared script, or the lecturer may use a set of notes or prompts. It is quite common for a lecturer to make use of visual aids, such as flipcharts and PowerPoint presentations.

Lectures can be modified to include a range of methods, including discussion, role plays and demonstrations etc. which increase trainee participation and engagement.

Advantages of lectures:

- A lecture covers a large amount of material in a short time.
- The trainer has complete control over the material and the sequence in which it is presented.
- It is particularly suitable for introducing a topic
- It is suitable for both small and large groups, as long as the trainer can be seen and heard.
- It can be used with new and advanced learners.

Disadvantages of lectures:

- It is one-way communication only, leaving the trainer with no way of checking if learning has taken place.
- There is little or no participation by learners.
- The learners have no control over content or pace.
- Trainers have to spend a large amount of time preparing for lectures
- It is difficult to hold attention of learners due to lack of participation

Discussion

Discussion sessions are planned conversations (exchange of ideas or viewpoints) on a selected topic.

Both you, as trainer, and your learners should prepare for the discussion. You need a clear objective for the discussion, and you must manage the discussion so as to maintain this objective at all times. The atmosphere of the group is important: it should be relaxed, yet planned and organised. Make sure there is a definite beginning, middle and end to the proceedings.

If the discussion is to be both effective and efficient there should be a free flow of argument and debate. You may need to refuel the argument from time to time, by posing challenging questions whenever it appears to be losing direction or running out of steam. You should also ensure that the discussion is brought to a conclusion, rather than allow it to peter out. One way of doing this is to get someone to summarise impartially the major points covered in the discussion.

Advantages of a Discussion

- Appropriate for covering a few, important, simple points.
- Reinforces learning.
- Multiple points of view can be expressed.
- Allows all learners (even the shy ones) to express knowledge and ideas and listen to the knowledge and ideas of others.
- Good for creating an informal atmosphere.

Disadvantages of a Discussion

- Can be time consuming if not properly structured.
- It needs to be skilfully managed to avoid one voice dominating .
- It requires a well-defined purpose or objective, a reasonable time limit, and a well-trained leader.
- It is only effective in small groups.

Adaptations of the discussion method include: -

- **Case Studies**

A case study is a realistic situation involving a judgment call that is presented to learners, either orally or by handout, for analysis and resolution. It can be used for real life situations and where no clear cut solution to a problem is evident.

- **Simulation/Role Play**

Simulation / role play involves the presentation of job or task activities which replicate a real situation as closely as possible. This can be a very effective way of showing learners how they should deal with a particular situation.

Interviewing, for example, is particularly suited to the role-play method, provided that the participants get constructive feedback to enable them to adapt or change tactics. Role-play is also an effective method for changing attitudes or teaching interpersonal skills.

- **Buzz Groups**

A buzz group is another form of discussion and promotes the quick exchange of ideas. Usually it forms part of a larger training session. A large group can be broken down into smaller groups who are given short periods of time to consider a simple question or problem. Buzz group discussion times can range from two to

fifteen minutes. The group offers ideas or suggestions that are recorded. The small group ideas are then presented to the larger group for further discussion.

Buzz groups get their name from the noise or buzz the learners make in these groups and also from the fact that working in this way sets ideas buzzing in the learners' minds.

Demonstration

A demonstration is a live performance of a task, skill or procedure accompanied by an explanation. Usually it takes place after a lecture or talk. A good follow up is to allow trainees to do the task themselves with supervision.

Advantages of a Demonstration

- Easy to attract and retain the attention of trainees
- Reinforces correct procedures
- It may provide hands-on experience (hear, see, and do).
- Trainees get plenty of attention from the trainer
- Each trainee can go at his/her own pace to achieve mastery.

Disadvantages of a Demonstration

- Careful preparation is necessary
- Can be time consuming
- It may require a lot of equipment and/or materials so that everyone has the opportunity to learn simultaneously
- May have to be repeated a number of times if the task is intricate and the group is large.

Project Based

Projects are usually large real world assignments which require that a definite task be accomplished within a fixed time. This may involve writing a report which could contain recommendations regarding a given problem or some particular aspect of it. Project based learning involves a range of diverse skills such as researching, writing, interviewing, collaborating, or presenting.

Projects are best conceived within the framework of an overall instructional plan. They should be set out within the scheme of work, and referred to in the lesson plans as an integral part of the programme.

Advantages of project based learning

- Learners gain a more “integrated” understanding of the concepts and knowledge.
- Involves a range of skills.

- Can increase interest in what is being taught, strengthen motivation, and make learning experiences more relevant and meaningful.
- Projects can be specifically tailored to specific needs, learning styles and abilities.
- They can be used to review learning from a number of earlier units in a course.

Disadvantages of project based learning

- The trainer must be sure that all the necessary ground-work is covered.
- They require extra time and may require extra resources.
- It can be more difficult to devise a marking system for assignments and projects than for some other methods.
- Not suited to learners who lack motivation or who struggle in less structured learning environments

Resourced Based Learning

Resource based training can be seen as a form of self-directed learning where the trainee takes responsibility for learning, through selecting and managing their own learning activities within a given time frame. Trainers, in this context, provide a scaffolding, mentoring and advising function.

Types of resource based learning include:

- **Open and distance learning**

UNESCO defines open learning as ‘instructional systems in which many facets of the learning process are under the control of the learner. It attempts to deliver learning opportunities where, when, and how the learner needs them’. It is characterised by:

- Open admission (few or no prerequisite qualifications) required.
- Uncapped admission and enrolment.
- High levels of learner choice on programme curriculum.
- Recognition of prior formal and non-formal learning.
- Low or no on-site attendance requirements.
- Continuous enrolment and self pacing.

Open learning is often associated with distance learning; however some third level distance learning courses would have prerequisite qualification/experience requirements and are structured over particular time periods.

- **Blended learning**

The term blended learning is being used with increased frequency in academic and corporate settings. It is typically seen as a combination face-to-face instruction with computer mediated instruction (though online media). This course is an example of blended learning.

- **Programmed learning**

Programmed learning has been used since the late 1960s as a method of independent study. It uses self-paced instructional texts. The text is divided into 'frames'. Each frame is a unit of teaching, and it calls for the learner to do something or to answer questions. The correct answer is usually given at the start of the next frame. The programme follows a rigid systems approach based on detailed analysis and precise training objectives.

- **Computer-based training**

Computer-based training (CBT) uses computers to present information and to test learners on the information. In addition to computer software, a CBT package may also include a workbook and tutor's guide.

CBT packages often incorporate multimedia elements. This means that they use animation, short video sequences and sound, as well as text and still visuals.

Advantages of Resource based learning

- Learning can accommodate individual learning styles and objectives.
- Greater flexibility for scheduling learning. Learners can determine time and place of "class time".
- Training costs can be reduced in some instances.
- Learners demonstrate a greater awareness of their responsibility in making learning meaningful and monitoring themselves.
- Learners are more motivated and independent.

Disadvantages of Resource based learning

- Delays between learner contributions and trainer feedback.
- Learners must be more active and self-directed in the learning environment.
- Low level computer skills, lack of a computer or poor broadband connection.
- Demands large effort and cost to develop appropriate materials, and maintain the technological infrastructure (if online).
- Can lead to information overload from online resources.
- Learners may experience social isolation and frustration.

- **One-to-one training**

One-to-one training is designed to assist a single individual achieve a personal goal or learning outcome. It is sometimes referred to as Coaching.

Advantages of One-to-one Training

- Focuses on the needs of a single individual.
- Can be designed for a specific time-period or may be enduring.
- The coach may apply mentoring, values assessment, behaviour modification, behaviour modelling, goal setting and other techniques in helping their clients.

Advantages of One-to-one Training

- Tends to focus on the achievement of a goal or specific skill.
- Costs, due to lack of economies of scale.
- Coaching draws inspiration from disciplines including sociology, psychology and positive adult development, career counselling, mentoring and other types of counselling – therefore coaches need to have wide experience.



My notes for Training Delivery Methods

Scheme of Work & Lesson Plans

Scheme of Work

A scheme of work is a guideline that defines the structure and content of a course. It maps out how **resources** (e.g. books, equipment and time), **course activities** (e.g. teacher-talk, group work, discussions) and **assessments** will be used to ensure that the learning aims and objectives of the course are met successfully. It will normally include times and dates.

The scheme of work is an interpretation of a specification or syllabus and can be used as a guide throughout the course to monitor progress against the original plan. Schemes of work can be shared with students so that they have an overview of their course. The content of the Scheme of Work typically includes:

1. **Session title** — this should describe the programme well.
2. **Learning outcomes** — what you expect the students to have achieved by the end of the lesson as a result of your instruction.
3. **Mode of delivery** — lecture, eLearning etc.
4. **Learner activity** — for example, cases, paired-groups etc.
5. **Assessment of learning** — a brief outline of how learners will be assessed (in relation to the learning outcomes).
6. **Resources** — briefly outline the resources to be used by the tutor and/or students.

The above items are completed for each session/unit or class.

Scheme of Work Example

Course:		Media Interview Skills	Course Date: 12/1/2020	
Instructor:		Damian McCourt		
Location:		Carlton Hotel, Blanchardstown		
Day	Time	Topic	Aim	Assessment
1	9:30	Introductions and overview of course	Settle learners, introduce the aims, objectives and outcomes of the course	None
1	10:00	Interview fundamentals	Recognise common mistakes and use preparation techniques to avoid them	Quick-fire Q&A sessions and scoreboard
1	10:45	Break	-	-
1	11:00	Managing nerves	Recognise and moderate your stress response	None
1	11:45	Interview practice	Put what you've learned into action	Roleplays and fishbowl exercises
1	12:30	Lunch	-	-

Lesson Plans

While there are many formats for a lesson plan, most lesson plans contain some or all of these elements, typically carried out in this order:

1. **Title** — the title or name of the lesson.
2. **Time** — the time required for the lesson.
3. **Materials** – a list of required materials.
4. **Statement of objectives** — tell students what they will be able to do because of the lesson. List the objectives, which may be behavioural objectives (what the student can do at lesson completion) or knowledge objectives (what the student knows at lesson completion).
5. **Anticipatory set** (setting the stage) — this is the “lead-in,” which focuses students on the lesson. These include showing pictures or models, asking leading questions or reviewing previous lessons.
6. **Instructional input** — this instructional component describes the sequence of events that make up the lesson. This includes the trainers' instructional input and guided practice the students use to try new skills or work with new ideas.
7. **Modelling** — this is where you demonstrate or show what you tell.
8. **Guided practice** — help students start practising new skills, applying new knowledge alone or in groups.
9. **Independent practice** — allows students to extend skills or knowledge on their own.
10. **Check for understanding** — watch faces, ask questions and ask if learners understand the topics.
11. **Summarise the lesson** — this is where the trainer wraps up the discussion and answers questions.

Lesson Plan Example

Lesson topic	Preparing for media interviews	Level of Topic	Beginner
Suitable for	Sales/management/marketing staff	Number of participants	10
Lesson duration	50 minutes	Author	Damian McCourt

Timing	Learning Objective	Content	Instructor Activity	Learner Activity	Resources Required	Learner Assessment
5 minutes	Create a real-world challenge	Description of upcoming crisis briefing	Outline the scenario and the report learners will be required to give	Listening, asking questions	Slide Deck 1	Open questions, around-the-room
10 minutes	Recognise common mistakes	Interview disasters video			Interview disasters video	Analysis of video exercise – what did they do wrong?
5 minutes	Understand the need for robust preparation	Interview with a volunteer learner	Roleplay- learner TV interview	Fishbowl – watching or taking part in roleplay	Props – mike and camera	Feedback from watching learners
20 minutes	Using brainstorming to identify possible questions	Rules for brainstorming sessions	Monitoring and guiding group activity	Group exercises brainstorming interview questions	Flip charts or whiteboards and post-it notes	Are all learners taking contributing to the brainstorming session?
10 minutes	Recall and use rehearsed answers	Memory and recall techniques	Quick-fire questions	Answering questions quickly and calmly	Scoreboard	Learners scored on composure, completeness of response, hesitation



My notes on the Scheme of Work and Lesson Plans

Training Aids

The imaginative and effective use of training aids can greatly enhance your training. We will look at how to choose, prepare and effectively use these aids, so that you can integrate them into your training talks.

Consider the following diagram based on the work of Edgar Dale. During the 1960s, Edgar Dale theorised that learners retain more information by what they ‘do’ as opposed to what is ‘heard’, ‘read’ or ‘observed’. His research led to the development of the Cone of Experience. Today, this ‘learning by doing’ has become known as ‘experiential learning’ or ‘action learning’.

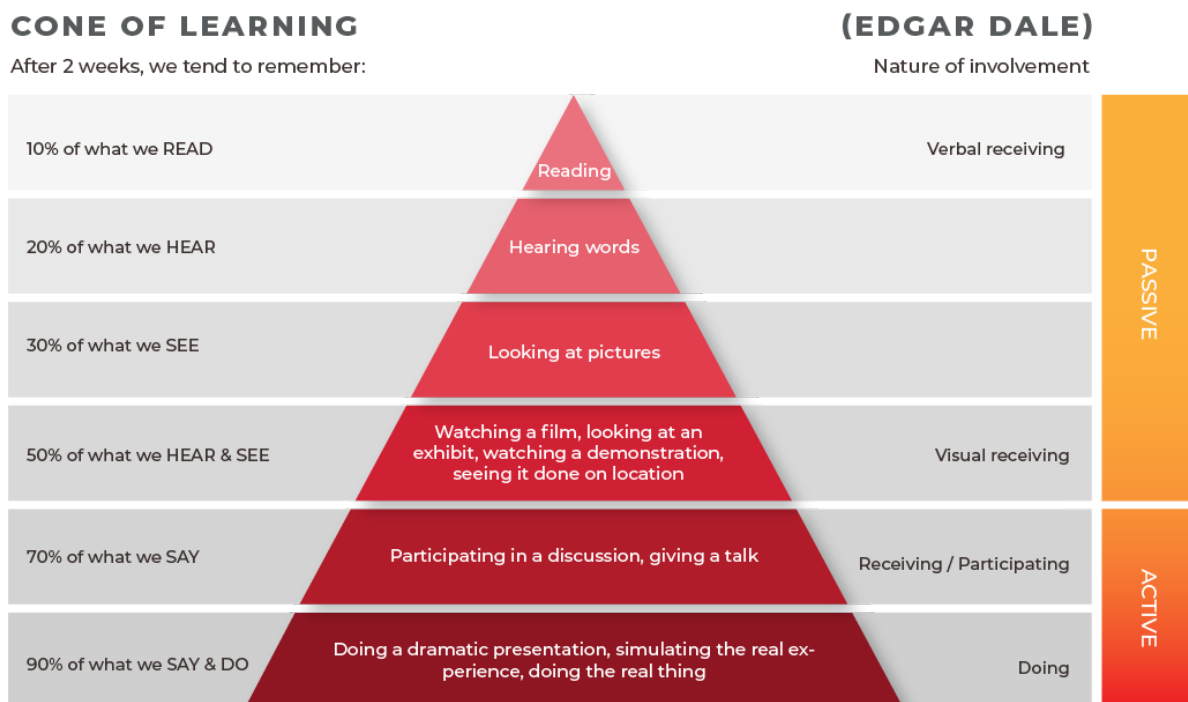


Figure 1.18 Edgar Dale Cone of Learning

Learners actually retain more where two or more of the senses are combined in the learning process. If a picture is worth a thousand words, then it is important that you, the trainer, combine training aids with the spoken word to impart knowledge to your learners.

Used correctly, training aids arouse interest in the learner. However, remember that they are simply aids for the trainer. They should not be used unless they really add to the training situation in question. They are not a crutch for the trainer to lean on, or something that must be used all the time.

A training aid should help:

- The learner understand.
- The trainer communicate more effectively with the learner.

Effective training aids should be:

- Visible to every participant.
- Simple to read and to understand.
- Suitable for the training situation and environment.
- Informative in a concise fashion.



Learning Activity

For this Activity please list all of the training aids you have experienced and give two advantages and two disadvantages of each, based on your own experience.

Flip Charts

The flip chart is one of the most commonly used training aids. It has an easel-type stand, to which pages, or flip chart pads, are attached.

Flip charts are suitable for small and medium size groups. They can be used for both formal and informal training talks/ presentations, and during discussions. For formal talks, the flip chart sheets can be prepared beforehand to a high professional standard, if appropriate.

The lettering should be at least 2" (5cm) high. Markers and pens for flip charts come in a variety of sizes. Use two or more colours for effect. It is important that your lettering is legible.

Write key words only. Use space to separate blocks of information. Use arrows or bullets to indicate points, if you wish. Don't try to pack too much information onto a single page. Try to keep to eight lines per page.

Use colour to brighten up your training talk. The following colour combinations are effective, but experiment to get the best effect for you. Black and blue are the easiest to see. Red/ green will look the same to colour blind individuals.

There are two main ways of using the flip chart:

- 1. You can write on the flip chart during the training session.** This is particularly useful when taking feedback from small working groups. Remember, do not talk when writing because it is difficult for an audience to hear a speaker who is facing the other way. Every time you turn your back on your audience your voice and their attention disappear. For some training talks, it may be a good idea to tear off each completed page and hang it on a wall for reference.
- 2. You can prepare the flip chart sheets beforehand.** Write key points only on the flip chart. It is often a good idea to leave a blank sheet between prepared sheets. Otherwise, when you are dealing with one sheet, the learners will be able to see the outline of the next sheet. If you take time to prepare flip charts for presentation and if you want to use them again, you should take care of them. Store them flat if you have space, or, alternatively, roll them up and use an elastic band.

Advantages of flip charts are:

- They are relatively inexpensive.
- They can be prepared in advance, and can be used again and again, if stored properly.
- They are ideal for note-taking during discussions.
- The trainer can use them as a tutor's guide by writing notes in pencil on the pad.

Disadvantages of flip charts are:

- They are only suitable for small to medium size groups.

- Your writing must be legible.
- Care must be taken of the pads, if they are to be used again.

Powerpoint (Or Equivalent)

PowerPoint is visual presentation software. Computer based visual presentations are becoming the standard for most educational or business related presentations. You will need a data projector and a computer. Your training talk can be saved on a memory stick.

There are a number of key guidelines to keep in mind when preparing a PowerPoint presentation.

- Keep your slides simple
- Do not put too much text on a slide No more than six points per slide.
- Lettering on the slides needs to be large enough to be read from the back of the room, this usually means 28-34 pt.
- Use fonts that are easy to read such as Arial, or Calibri. These are sans serif fonts, where each character is independent from its neighbours, and are good for reading shorter pieces of information.
- Use colour sparingly, black lettering on a plain white, pale background, or white lettering on a dark blue background work well. Remember some people are red/ green colour blind.
- Never use all capitals.
- Use pictures or charts as well as text to aid visual learners
- Do not over use special effects such as moving text, this will only distract from your training talk.
- Use only key words and phrases. Do not write out full sentences and then read them.
- Discuss your slides. Speak to the audience not to the slide.
- You should aim to have no more than one slide per 2 minutes of talk. This would be 10 for a 20 minute training talk.
- **PRACTICE** beforehand– with the equipment and with the slides
- Have a backup plan in case of equipment failure.
- Handouts can be easily produced.

Whiteboards

Whiteboards are usually wall-mounted and have a high glossy finish. Some boards are available on special stands which facilitate mobility. Special whiteboard markers should be used as the whiteboard can then be wiped clean. Interactive white-boards (SMART Boards) allow the trainer to print and save the work and give copies to the participants or those who might have missed the session.

The SMART Board, an interactive whiteboard helps energise training talks and motivate learners. It combines the simplicity of a whiteboard with the power of a computer. The touch-sensitive display connects to your computer and digital projector to show your computer image. You can then control computer applications directly from the display, write notes in digital ink and save your work to share later.

DVDS/ YouTube

The value of DVDs/YouTube lies in the ability to show interesting realistic pictures of objects or situations which would otherwise have to be imagined. They can be a great help, if chosen with care. However, much of their effectiveness can be lost unless they are followed up with explanation, discussion and application. Ensure that the DVD's/YouTube contents are suited to the training objectives.

Never show a DVD/YouTube clip without introducing it to the audience. State the learning objectives before it is shown. Ask the group to take notes during the DVD/YouTube clip, if appropriate.

Stop at relevant points to ask questions and test the learning of the group. Include time for discussion.

Take feedback, where appropriate. Feedback is essential if the DVD/YouTube clip is particularly entertaining, since the group may enjoy it but fail to note the key learning points.

You should preview the material prior to using it. You can also use a video camera and recorder to record sessions within the classroom. This can be a very good way of giving feedback to learners in certain skills, such as presentation and interviewing skills

Handouts

Handouts can be used to give the audience a full record of your training talk, or if you need to provide more detail than can be usefully included on a slide. When using handouts decide if you are going to distribute them before you start, or after your training talk. If you pass them out while you are speaking learners may lose focus.

If you want individuals to refer to a particular part of a handout, give them the page number so that they can locate it quickly. If individuals do not need the material during the training talk, indicate that you will distribute a summary/ course notes at the end.



My notes on Training Aids

Assessment

Assessment is concerned with measuring how much has been learned, or whether the learner can perform to a particular standard. Your training objectives and learning outcomes provide you with a foundation for assessment.

The purpose of assessment is to provide evidence on which to base feedback to the learners, trainer and organisation. This is known as validation.

Internal validation is the use of a series of tests and assessments designed to ascertain whether the training activity has achieved its objectives and learning outcomes. In other words – did the participants learn what they were taught?

External validation aims to find out whether participants have applied what they have learned in training to the job context, and whether they are able to perform to a required level post training.

To maximise on the effectiveness of training, assessment should ideally be continuous rather than end-of-course so that the learner can receive regular feedback and trainers can introduce additional strategies and further practice where necessary.

Transfer of Training

The term ‘transfer of training’ refers to the extent to which the knowledge, attitudes and skills learned during a training session are applied in the work situation.

Positive transfer is where new learning is transferred and applied. Negative transfer is where new learning creates inhibitions which prevent the acquisition of new skills, and sometimes the training has no effect.

External validation is concerned with measuring the degree to which learners effectively apply the knowledge, skills and attitudes to the job. For transfer to be really effective new skills must be used and maintained for a period of time after the training process (Baldwin & Ford, 1988). According to Baldwin and Ford the maintenance of training content in the workplace is directly influenced by three major factors:

- Trainee characteristics (ability, personality and motivation);
- Work environment (support, opportunity to use);
- Retention of learning which, in turn, is influenced by training design, including principles of learning, training sequence and content.

External validation should be conducted through a post training assessment. If too much time elapses it will be difficult to identify those skills gained in training and those acquired through the job. Assessment, in this case, would most likely be carried out by the learner’s line manager.

Colleagues, subordinates and clients may also be in a position to make a valid appraisal of the learners post training performance.

Knowledge/ performance can be assessed through questionnaires, interviews, action planning, observations, performance appraisals, examination of output or any combination of these methods.



Learning Activity:

For this activity recall a learning experience where you successfully transferred your knowledge and skills to another setting.

What helped you transfer your knowledge and skills? Were there interventions or activities that were useful in supporting your transfer of training to your job?

Practical Assessment

Practical assessment involves two processes:

The measurement of performance and a judgement about the competence achieved by the learner.

When planning practical assessment, ask yourself

1. What is required?
2. What instructions will I give?
3. What assessment points will I use?
4. What will I accept as good enough?

Once you have identified your assessment points you can allocate marks to each point. These marks can also be weighted, in that one point may carry more marks than another, if you consider it to be more important. Allocate marks to the various parts of a test before you run the test. This is important for objectivity.

Assessments may also employ a rating scale instead of single marks. A rating scale provides a means for assessing a range of performance.

For example if you were assessing a training talk. You might identify the following quality points

1. Is the talk well introduced?
2. Is the audience involved?
3. Are the points well presented?
4. Are the visual aids used properly?
5. Is the summary comprehensive?
6. Does the test measure the group's understanding of the material?

Each item could be marked out of five, using a scale:

Excellent 5
Very good 4
Good 3
Fair 2
Poor 1

Knowledge Based Assessment

Knowledge and understanding can be assessed using a variety of oral and written tests.

Most of the points already made about practical tests also apply to oral and written tests.

Make sure that you write out the questions beforehand, and that they are clearly linked and arise from learning outcomes.

Preparing Oral Tests

- Write questions which have a specific answer.
- Do not prompt the answer with the question.
- Do not sequence the questions in such a way that one question provides the answer to the questions which follow it.

Preparing Written Tests

There is a wide range of written tests. It is usually better to select short answer rather than essay type questions for objectivity in marking.

The following are four kinds of short answer questions.

- **Short open questions.**
These can be based on the learning outcomes. They will probably employ question words such as 'define', 'state', 'describe'.

For example;

'Define the term learning'.

Short questions such as these can be marked easily and quickly, and there is little possibility of different marks between different trainers.

- **Completion type questions.**
These have the following format

'A good assessment test should _____ the skill being taught in the lesson' (the answer is 'measure')

You need to be careful when composing completion questions that the word you are looking for is the only suitable one for the space.

- **True/ False statements.**
The answer is either wholly true or wholly false. These work well when you have a lot of

true/ false statements but remember that even learners with no prior knowledge of a subject, will, on average, achieve a 50% score.

- **Multiple choice questions.**

These can take a lot of time to compose. In multiple choice items the main part, or stem, contains the question and four to six alternative answers are provided. Only one answer is correct. The others are called distractors. Your distractors should be plausible or contain common errors. Avoid distractions which are obviously false.

Portfolio Based Assessment

A portfolio is a collection of work that a learner puts together throughout a course to demonstrate their skills, and to show their development over a period.

The following are some advantages of portfolio assessment:

- Can incorporate continuous assessment, rather than a once off end-of- course exam. This reduces pressure on learners. Learners generally prefer this, as it is less concentrated, involves less anxiety and is perceived as fairer than a once-off assessment.
- Can assess the entire range of a course, rather than just some elements of it.
- More authentic than an end of course assessment. Authentic assessment is where you test the performance of the skill in a way that is as close as possible to what is required in the work situation.

In testing knowledge, you may have to include items not mentioned in the objective but which are a necessary part of the subject. For example you may have to test background understanding of the subject. These items are sometimes referred to as 'implied enabling objectives'. The goal of all training is to maximise the transfer of learning from the training environment to the organisational environment.



Learning Activity:

For this Activity examine the following learning outcome.

Given a suitable cotton triangular bandage and a standing or sitting patient, apply a large arm sling to the patient's arm. The sling will be applied in one continuous fluid movement, without shaking the arm, tied in the correct position with a reef knot, holding the injured arm in a comfortable position for the patient.

Now answer the following questions:

1. What is required in order to achieve the learning outcome?
2. What instructions should be given to the learner?
3. What assessment points are necessary? What will show you that the learner has achieved the outcome?



My notes on Assessment

Further Reading

<https://trainingindustry.com/>

Training Industry is the most trusted source of information on the business of learning. Their website serves as an expert resource for learning professionals seeking information about best practices and innovative approaches

www.businessballs.com/

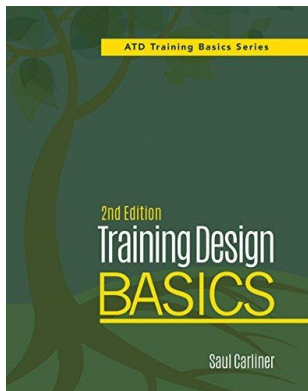
BusinessBalls.com is a free ethical learning and development resource for people and organisations. The site was founded by Alan Chapman in 1999 and redeveloped by Accipio in 2017, as part of a new partnership. Accipio provides the ongoing management and continues to innovate and release functionality to enhance your learning experience.

www.mindtools.com

Mind Tools is one of the world’s most popular digital, on-demand career and management learning solutions, helping more than 24 million people each year. Mind Tools provides access to 2,400+ resources, including articles, podcasts, videos, infographics, quizzes, book insights, expert interviews, and more.

https://www.mindtools.com/pages/main/newMN_ISS.htm

Learning Skills - Learn and Develop Others More Effectively

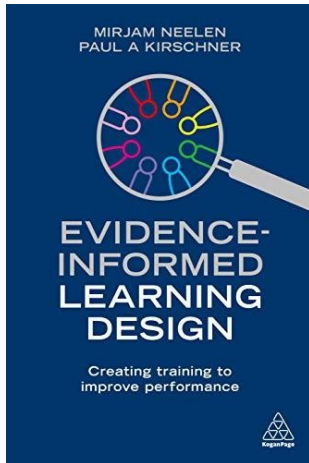


Training Design Basics by Saul Carliner

As the title suggests, this book goes into more detail on a lot of the topics covered on this course. Training needs analysis, adult learners, evaluating learning and creating training manuals are covered in addition to a lot of other useful topics.

ISBN-13: 978-1562869250

ISBN-10: 1562869256

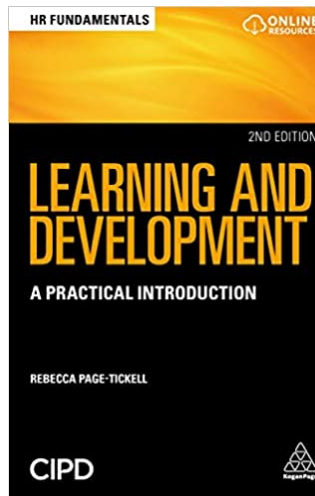


Evidence-Informed Learning Design: Creating Training to Improve Performance by Mirjam Neelen and Paul A. Kirschner

This book goes into much more detail on designing training programmes for the enterprise, particularly on using solid training theory, measuring effectively, and avoiding common pitfalls in training design.

ISBN-10: 1789661412

ISBN-13: 978-1789661415



Learning and Development: A Practical Introduction (HR Fundamentals) by Rebecca Page-Tickell

This updated second edition of Learning and Development covers the latest trends and developments in the field, such as e-learning, gamification and Massive Open Online Courses (MOOCs), as well as new material on learning measurement and additional international case studies.

ISBN-10: 9780749483494

ISBN-13: 978-0749483494

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