Workplace training category 1: learning materials module.

Trebilcock, Carolyn; ANTA National Staff Development Committee.


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Workplace Training
Category 1

Learning materials
module

A project of

National Staff Development Committee
For Vocational Education and Training
Workplace Training

Category 1

Learning Materials Module

Library
National Centre for Vocational Education Research
Level 11, 33 King William St.
Adelaide SA 5000

National Staff Development Committee
This project relied on consultation with numerous TAFE staff and other people employed in the vocational education and training sector throughout Australia.

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Introduction

Welcome to Workplace Training (Category 1)!

This course will enable you to plan, deliver and evaluate training sessions in the workplace on a one-to-one or small group basis.

It is designed for those who provide training in the workplace, but not as a major part of their job. It is expected that your training will be informal, but structured.

We, the developers of this learning package, hope you will find the course interesting, useful and rewarding.

The learning team

Three of the crucial players in the learning team are you, the learner, your facilitator and this learning package. The central player is, of course, you, the learner. Before looking at the notion of self-managed learning, which stresses your role, we consider the other two players. What do they provide—how should they assist you?

The learning materials

The learning materials present information, activities and assessments which permit the development and achievement of the learning outcomes. Case studies and examples are also presented to illustrate and reinforce the ideas being presented.

Activities

The activities are designed to stimulate you to explore or debate with, and to apply the information which has been presented. Doing the suggested activities can greatly increase the extent to which you understand, remember and can use the material.

Please look on the activities as suggestions. To tailor the training program to best meet your particular needs or circumstances it may be appropriate to select or modify activities. You should consult your facilitator about this. The crucial question is what learning experiences do you need to fully equip you to do the assessment activities—and thereby to demonstrate that you have achieved the learning outcomes?

The options include:

- to do every activity just as suggested;
- to do some and not others;
Feel welcome to really use this package: to underline or highlight bits...

- to do some activities more than once to practise the skills;
- to modify some activities to make them more appropriate to your particular circumstances.

Many of the activities require you to be part of a group so you need to check with your facilitator on how these will be organised.

We recommend that you put your responses to the activities in the space provided with the activity. If you find there is not enough space you can use extra paper (lined or blank, as preferred). You could use the blank pages provided at the back or separate paper, which you may like to keep in a folder.

Assessment activities
These are designed to allow your facilitator to assess your achievement of the learning outcomes.

It is always useful to be clear about the way in which you are going to be assessed. Take a look at the assessment section near the end of the package now, to get an idea of what you will be asked to do to demonstrate competency. Your facilitator should indicate whether there is any scope to modify the proposed assessment.

Note on use of the materials
Please feel welcome to really use this package: to underline or highlight bits; to make notes in the margins of the pages; to use the last pages to attach relevant information or to make notes, or to put down longer answers to activities.

The role of the facilitator
We expect that the facilitator of the course will:

- make decisions about the way(s) in which the training program is delivered;
- encourage self-management of the learning process (as noted below);
- respond to your questions or concerns;
- provide guidance about access to other learning resources.

Facilitators are expected to be familiar with this package, including the requirements for the activities and assessments, so that they can suggest changes to tailor the course to your needs.
Self-directed learning

In line with the philosophy behind the development of these flexible delivery learning materials, you should be given as many opportunities as possible to make decisions about your own learning and to take responsibility for your own learning.

Of course, the extent to which this is possible may be constrained by a number of factors including location, access to resources and time constraints.

Time and topic sequence

Nominal duration of the program

As a guide we expect that 30 hours are needed to cover the information presented. You may need to spend up to the same amount of time again to complete the activities and assessment activities.

Suggested time per topic

<table>
<thead>
<tr>
<th>Topic</th>
<th>Suggested time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preparing a training session</td>
<td>8–10 hours</td>
</tr>
<tr>
<td>Delivering a training session</td>
<td>10–12 hours</td>
</tr>
<tr>
<td>Evaluating a training session</td>
<td>3–5 hours</td>
</tr>
<tr>
<td>Administration and liaison tasks</td>
<td>3–5 hours</td>
</tr>
</tbody>
</table>

Suggested topic sequence

We recommend that you do topic 1 before topic 2 because it provides some of the underlying knowledge and skills required for the second topic. Similarly, topic 3 is more relevant if you apply it to the activities you worked on in topics 1 and 2. Topic 4 is possibly the most flexible because it could be applied to any training currently being conducted in your workplace. Your previous experience in the training field will affect how important it is to follow the suggested sequence.

The range of learning options

The course is designed to be flexible and to cater for a wide range of needs.

Different modes of learning

Depending on needs and circumstances the course may be offered by a facilitator through:

- face to face contact;
- small group workshops;
Goal setting is one way of being actively involved in the learning process.

- independent work;
- occasional telephone or video conference linking;
- a combination of the above.

Options for duration and intensity

The course may be run over a shorter or longer period of time. Whatever timeframe is chosen you should have opportunities to develop concepts and undertake the formative activities, and a sufficient period of time to prepare for or undertake assessment activities.

Personal outcomes

The learning outcomes presented at the beginning of each topic are what you need to achieve to be deemed competent in this course. They are outcomes that others have determined must be met. But, as a learner, you will have your own goals. Some of the goals may match the ones given in the course, while others will be different. You could see this as an opportunity to explore an area of personal interest or to challenge yourself by tackling something that is new or difficult for you. Or your goal may be very straightforward; to get through this course as quickly as possible!

Goal setting is one way of being actively involved in the learning process. It is also one of the basic principles underlying effective learning. Clarifying what you, as a learner, want to achieve before and during a course of study can give you a personal sense of direction and help make your learning more relevant.

So take a few minutes to reflect on the following questions—and best wishes for successful completion of this module!

Why are you studying this course?

What outcomes do you want to achieve?

How will you know when you have achieved them?

(What criteria will you use to measure your success?)
Key to icons used

In these learning materials you will find the following icons (symbols):

- **LO** Learning outcomes, with assessment criteria
- **A** Activity
- **?** A question for you to reflect on
- **AA** Assessment activity
Learning outcome 1
Prepare a training session plan

Assessment criteria
1.1 Describe the specific training need and how it was determined.
1.2 State the expected outcomes of the training in terms of the identified training need.
1.3 Select training activities that are appropriate to the:
   - training outcomes
   - needs of adult learners
   - availability of equipment and resources.
1.4 Sequence the session activities in a logical order.
1.5 Identify appropriate points for monitoring trainee progress.
1.6 State evidence required for assessment and how it will be collected.
1.7 Identify the location, resources and personnel to be contacted.

Topic introduction
This topic covers the preparation that trainers need to do before they actually take their training sessions. It starts off with the mental preparation—where the trainer thinks through the issues; and then moves on to the written preparation—where these thoughts are transferred to paper.

As a way of preparing yourself for this topic think for a moment about yourself as a learner.
In this course you are a learner: learning how to become a trainer.

When you look at the following diagrams you’ll notice that the people take on different roles in the different settings.

In the first diagram YOU are a participant in this Workplace Training Category 1 course. Hopefully you are learning the skills and knowledge that you’ll need as a trainer.

In the second diagram YOU are the trainer delivering a vocational training course to your trainees. Hopefully you are using the skills and knowledge that you learned when you did your Workplace Training course.
In the third diagram YOUR trainees are doing their job in their workplace. Hopefully they are using the new skills and information they learned from you in the vocational training course.

These diagrams help to point out two important aspects.

1. The learning experiences that you have during this training will provide valuable memories for you to refer to when you are planning and delivering training to your own trainees.

2. The situation that your trainees will be working in always gives you a point to focus on. It will help you make sure that your course contains exactly what they need to know and do in the work situation that they are being trained for.
While you are learning this information about workplace training, take some time to reflect on these questions.

1. What things make it easier for me to learn how to do something new and remember it?
2. What things make it harder for me?
3. What kind of person do I think makes the best trainer?

Activity 1

Think about the work situation that your trainees are most likely to be in after they have done your training sessions. Will they be:

- operating a machine?
- interacting with customers?
- working on an assembly line?
- driving a vehicle?
- other? (please describe)
Activity 2

Answer these three questions about yourself.

(A few sample answers have been given just to start you thinking. Cross them out if they don’t apply to you.)

1. What things make it easier for me to learn how to do something new and remember it?
   
   Having a go at it.
   
   Asking questions.

2. What things make it harder for me?
   
   If I feel nervous.
   
   If the trainer talks too fast.

3. What kind of person do I think makes the best trainer?
   
   Someone who doesn’t make me feel stupid.
   
   Someone who takes my questions seriously.

Knowing your own answers to these questions can help when you have to train someone else. Of course your trainees’ answers will probably be different from yours, but this just shows that no one should assume that the things they find helpful will also be helpful for everyone else.
Needs of adult learners

Adults often experience a number of feelings or thoughts when they are first in a training situation, especially if it is in a group. The feelings could be fear, embarrassment or anxiety and may come because they are concerned about such things as their:

- level of reading, writing or maths skills;
- level of confidence;
- cultural differences in their background;
- previous experience with the topic;
- age;
- physical ability;
- general knowledge;
- gender.

As well as these factors there are other things that particular trainees can see as barriers to learning, things like:

- the speed that the trainer presents the new information;
- the physical layout of the training area (not enough room);
- the learning environment (heating, lighting, not enough equipment);
- the trainer's attitude.

The fact that you are now participating in a training course could help you to understand how your trainees may feel when they are doing one of your training courses.

Reflection

Did you have any particular feelings or thoughts that held you back when you first started this course? Were there any other barriers to learning that you experienced?
Jot down a few of these.

You will need to be aware of the different levels of ability in your trainees and show them that you are concerned about meeting their particular needs. Find subtle ways to do this that don't make it obvious that certain trainees have to have special attention. Some contact with the trainees or research on them before training begins will help you understand their needs.
When you are thinking about training needs, don’t just consider the current needs of the workers in the organisation; try to predict their needs for the foreseeable future. This makes it important for you as a trainer to keep up to date with trends in your industry and to make suggestions about the kind of training needs that are likely to surface down the track.

Workers have a training need when they:
- cannot carry out particular aspects of their job because they -
  - do not know how
  - know how but can’t apply this knowledge to their job;
- cannot perform the job to the standard that their organisation expects of them.

Sometimes a worker is able to carry out those aspects of the job but for some reason will not. In these circumstances, training may not be the answer—it may be that:
- the job needs redesigning;
- the standard procedure for doing the job is outdated or too long;
- the aspect is not seen as necessary by workers;
- the rewards for doing the job by the standard process are not satisfying;
- the worker’s attitude is negative;
- the worker doesn’t have the appropriate equipment.
Activity 4

1. How does your organisation work out that some staff need training?

Tick the boxes of the methods your organisation uses to identify training needs.

- look at the productivity levels
- look at the reject or error rates
- look at the faults in the product
- look at the down-time rate and location
- observe the current skills of the workers
- discuss the workers’ current skills with their supervisor
- discuss the current skills with the workers themselves
- check the standard operating procedures (SOPs) manuals
- check documents showing the industry competency standards
- check staff appraisal forms
- check staff training records
- conduct a training needs analysis
- other (describe)

Discuss this with the people in the group and find out the four most common methods.

2. Who in your organisation decides when training is needed:

- senior manager?
- supervisor?
- senior trainer?
- workers?
- other? (specify)
Competency-based training is concerned with helping trainees to achieve the specific skills and knowledge that are expected in the workplace. The trainees must be able to apply the skills and knowledge in a way that meets the standards required by their enterprise.

When a training need is first determined it is often described in general terms.

Example

Merv, the supervisor, approaches Georgia, an experienced checkout operator, to talk to her about training a new worker.

'Georgia, over the next few days I'd like you to show Mark what a checkout operator does.'

Sometimes these general terms are not enough. In this scenario Georgia asked her supervisor for some more details. This helped him to be more clear about what he wanted her to show Mark.

'Sure Merv. What do you want me to show him?'

'Well, show him how to use the till and operate EFTPOS.'

The key word is an action word that describes the job or task for which the person needs to be trained. Sometimes the action word relates to DOing and sometimes it relates to SPEAKing.

Examples

1. Make photocopies of a report.
2. Load boxes on to a truck using a forklift.
3. Wash a client’s hair.
4. Describe the rules governing the storage of chemicals.
HINT
When you have to work out training needs see if they pass the 'Watch Me' test.

Can you fit the training outcome into the end of this sentence. 'Watch Me ...'

Examples
Watch me operate a cash register.
Watch me cook this cake.
Watch me explain the uses of this product to my customer.
Watch me discuss the safety issues with my supervisor.
Watch me change these gas fittings.

Activity 5
Describe a number of training needs that you could be expected to plan and conduct the training for in your organisation. Underline the action word that starts each one.

- 
- 
- 

Required skills and information
After the training need has been determined, the next step is to identify the skills and information a competent worker uses when performing the job or task.

In many industries the trainers use their industry competency standards to find out the required skills and information for any job or task. These will be written as learning outcomes or training outcomes.
Broadly speaking the industry competency standards:

- show all the skills that a competent worker must perform to carry out a task or job;
- give certain information about the standards and conditions that need to be met when performing the task competently.

These standards and conditions refer to:

- quality;
- quantity;
- time conditions;
- occupational health, safety and welfare (OHS&W) matters;
- locations;
- materials that must be used;
- speed;
- error rate allowed;
- storage.

Other workplaces have operating manuals, instruction sheets or written checklists showing the skills and information required for each job or task.

In some work situations a trainer might be asked to train workers in a job or task that doesn't have a written record of the required skills and information.

Let's continue with the scenario where Merv wanted Georgia to train Mark as a checkout operator.

'Am I supposed to follow a manual or something Merv?'

'No, Georgia, we haven't got one. Just think about all the things you do and make sure he can do them.'

'I'm not sure I'll cover them all.'

'Well, start off with the things you're doing all the time, like using the bar code scanner, operating the cash register, packing, talking with customers.'

'That sounds OK.'

'Then go on to other things you don't do so often, things like getting change for the till and calling for price checks.'

'I see, and changing the receipt roll, and manually keying in specials ...'

'Now you've got the idea Georgia. Great!'
At this point Georgia could see that she would need to do a bit of planning before she jumped into training Mark.

'Merv, it looks like I'll need a bit of time to write all this down so I don't forget.'

'Good thinking Georgia. You can have some time off after lunch to do that.'

'Thanks Merv. So Mark will start tomorrow morning, is that right?'

'Yes. How about I give you an hour to get set up and then bring him over?'

'Sounds fine.'

Appendix A shows a way of working out the skills and information required to do a task or job.

The following example shows the skills and information that a competent worker would be using to:

Make photocopies of a report

make:
- multiple copies
- double sided
- reduced/enlarged
- darker/lighter
- clear, sharp, legible
- certain number of copies within certain time limit
Topic 1  Preparing a training session

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copy pages:
- right way up
- in correct sequence

make copies without:
- smudges/marks
- crooked edges

use:
- manual feeder
- collator on the photocopier
- stapler on the photocopier

choose:
- appropriate paper size
- appropriate lightness/darkness

Activity 6

1. Write two brief workplace descriptions of the people you could be training.

Examples
- experienced production worker who wants to learn how to operate the lathe
- sales person working in the paint section of a hardware store
Topic 1  Preparing a training session

2. Describe in more detail what your trainees will be doing with the skills and knowledge they learn from your training course.

Examples
- operating a metal lathe, keeping it in good running order, working out what to do when something goes wrong with it, reporting major faults to the maintenance crew, keeping up supplies, maintaining tools, cleaning the lathe and work area, and keeping tallies for production records
- relating to the customer, finding out their purchasing needs, telling customers about the products, explaining pros and cons of certain paint products, demonstrating to customers who want help, giving advice about what product to purchase, providing extra information brochures, looking up stock records, ordering products for customers, keeping their own knowledge of products up to date, carrying out cash transactions, maintaining sales records

Activity 7
Think about the tasks or jobs related to the training needs you wrote down earlier. Select one task or job that you want to plan a training session for.

Find out if your organisation has:
- a written set of industry competency standards for the task or job you have selected;
- a manual or instruction sheet showing the SOPs;
- a checklist of the required skills and information.

Look through your documents and photocopy or make a list of all the skills and information that a competent worker is expected to use when carrying out the task or job you have selected.
Let's move on. So far we have covered these aspects.

- A person needs training in a certain task or job.
- You have been asked to train this person.
- You have identified all the skills and information that a competent worker is expected to carry out when doing that job or task.

Now there are two more general areas to look at.

1. Find out what the trainee can already do in this task or job. Which skills and information does the person already use competently?
2. Make sure the focus of the training is on the skills and information the person does not have.

Activity 8

Let's look at the first area.

How do you work out what skills and information a trainee knows and can already do for the job they are going to be trained in?

1. Brainstorm as many ideas as you can on this question.
   
   **Examples**
   
   - Show the trainee the competency standards or the checklist and ask them what they can do.
   - Ask their co-workers what they know and can do.

2. Discuss the question with experienced staff in your organisation who have trained people.

3. Write down any new suggestions they have and discuss them with your facilitator.
Now you have a list of all the skills and information that the person cannot do or use regarding the task or job. These are the skills and information that this person will expect to learn during the training sessions. They can be referred to as the expected outcomes of the training.

Planning a training program

How would you feel if, halfway through a training program you were running, you heard on the grapevine the following feedback from trainees.

'We don’t seem to be learning what we thought we were going to learn.'

It would be easy for you to feel disheartened—but at least you would have the chance of modifying the rest of your program.

If, at the end of the training program the trainees still hadn’t learned the required skills and information to carry out the new task or job, they might as well not have gone to the training sessions. They may have:

- had a good time in the sessions;
- got to know you better;
- found out lots of interesting (but inappropriate) information;
- learned how to do skills they don’t need on the job.

But … the main outcomes of the training have to be that the trainees can now competently perform all the skills of the task or job; and use any relevant information at appropriate times.
Training outcomes/learning outcomes

The training outcomes for your program will be a number of very clear descriptions of the skills and information that you will be helping your trainees learn during their training sessions with you.

Other words that some people use for training outcomes include:
- learning outcomes
- objectives
- aims
- goals
- requirements.

Your organisation may take their expected training outcomes from the industry competency standards, SOPs, manuals and checklists.

When you read a training outcome, you should notice that the first word in the sentence is an action word. Sometimes the action word relates to DOing and sometimes it relates to SPEAKing depending on the task the trainees are learning.

It would be interesting to look through them to see if the training outcomes use action words that you think your trainees could clearly understand and could easily prove that they have achieved.

If you think that training outcomes are not suitable you may have to:
- discuss them with your training supervisor
- reword them.

A common mistake is to use one of these words as the first word of the training outcome:
- learn
- know
- be aware of
- understand
- be able to
- believe.

These words should not be used in training outcomes because, at the end of the training program, the trainer cannot gather evidence of the trainee learning, knowing, being aware of, understanding, being able to or believing.

Trainers use training outcomes or learning outcomes to guide them when they select the topics of information and types of activities they want to include in their training sessions.
Each session that a trainer takes will have one or several training outcomes that the trainees are expected to achieve at the end of that session.

If your organisation does not use industry competency standards, SOPs, manuals or checklists you may be expected to work out your own training outcomes for your sessions. If so, the following activity will help you do this.

Activity 9

The training outcome you are expected to achieve in this activity is:

- Write three training outcomes.

Example

Training need: Make photocopies of a report

Training outcome 1: Make double sided, clear, B4 size copies.

Training outcome 2: Operate the stapler on the photocopier.

Training outcome 3: Make and staple 2 copies of a 6 page, B4 size report.

Look back at the list of skills and information you wrote out in Activity 7.

Select a number of these items that go together to make three training outcomes you could use in the one training program.

Write your outcomes in the spaces provided.

Training need.

__________________________

Training outcome 1

__________________________

Training outcome 2

__________________________

Training outcome 3

__________________________
Gathering evidence of trainees' competence

As part of the trainer's early preparation it is important to find out the following points about the assessment of trainees.

- Who collects the evidence and when?
- Will the trainer also be the assessor?
- Will the trainees be assessed by an external assessor?
- What assessment methods will be used by the external assessor?
- Will there be any room for negotiation about these methods or the type of evidence that will be collected?

Whatever type of evidence is going to be collected it must always relate to the training outcomes. Let's look at some training outcomes mentioned to get an idea of what this means.

1. Make 6 photocopies of a 10 page report without crooked edges, within 10 minutes.
2. Load 20 boxes on to a truck using a forklift so that the load is safe and not protruding from the edges of the truck, within 45 minutes.
3. Wash a client's hair using 25 ml of shampoo, within 15 minutes and without causing discomfort to the client.
4. Identify safety problems on the assembly line without disrupting production.
5. Explain to a customer the benefits of using our product, in a way that respects the customer's views and helps them make a positive decision about purchasing.

We can see here how helpful our training outcomes can be in deciding just what sort of evidence the assessor would be looking for.

Examples

In the first training outcome the actual photocopies that the trainee had made of the reports could be collected as evidence.

In the second one the evidence could be collected by observing either the actual worker's performance or a video of the worker's performance.
This shows also how important it is to think beforehand about the ways you want to collect evidence. For instance if you want to video your trainees performing a skill competently, then you'll have to make all the arrangements and be ready to 'shoot' at the appropriate time.

**Activity 10**

With at least one other person, think of ways to collect evidence of competence in the training outcomes 3, 4 and 5. Seeing you don't have to carry them out try to be as innovative as you can.

After you know what your training outcomes are think about how you are going to **check** if they have been achieved by the trainees. What will you need to see the trainees DOING that proves to you that they can now use the skills and the relevant information competently?

Try to get a picture in your mind of what evidence you want the trainees to show you that will prove that they are competent. How will you collect this evidence. Will you want to:

- observe them doing something?
- listen to them?
- read something they wrote?
- ask them questions?
- see something they made?
- get them to fill in a form?
- discuss an issue with them?
- talk to their supervisor about their progress?
Activity 11

Re-read the three training outcomes you wrote and briefly describe what you would do to check whether the trainees had achieved the outcome. What evidence would you be looking for?

Forms of training

When you are asked to carry out training, is it your responsibility to work out what form and how long it should take, or does a senior work colleague tell you?

Training can be:

- on the job
- off the job but located in the trainee’s usual workplace
- off the job in a special demonstration area
- off the job in your organisation’s training room.

As you read the following examples think about the different forms of training in your organisation.

On the job training

The trainee is expected to carry out regular work tasks of this job but is allowed extra time to complete each task because of the training aspect.

Off the job but located in the trainee’s usual workplace

The trainee is released from the regular work tasks for some time, such as an hour each day for two weeks, but will do the training in their usual work place location.
Topic 1  Preparing a training session

Workplace Training

Off the job in a special demonstration location

The trainees go to a special location to observe a skilled worker operate the machinery or equipment because it is not available in the trainees’ workplace or in the training room.

Off the job in the training room

A group of trainees go to a training room to do a training course.

You could combine several of these to make a series of training sessions, for instance:

- off the job in regular workplace + on the job practice
- in training room + on the job practice
- in training room + in demonstration location
- in training room + in demonstration location + off the job practice sessions in regular workplace

Activity 12
What form of training would you use for the training outcomes you have written and how long do you think this training would take?

Let's now look at how to write session plans.

Session plans

Reflect on the following example of a training situation.

The training session starts off with the trainees being very interested and paying attention. The trainer is talking about and showing things that the trainees can understand and have experienced. The session continues and the information seems to get harder and less interesting. Maybe the trainer is going too fast or trying to put too much into the time.

After a while the trainees begin to lose interest or not understand what the trainer is saying. Because of this they start daydreaming, or getting bored or even annoyed. Then just before the end of the session the trainees get interested again because they know that the session is almost over.
Each session has three parts:
- the Introduction
- the Body
- the Conclusion.

This example is a bit of an exaggeration but it shows how each session is made up of three parts:
- the Introduction—when interest is high
- the Body—when interest can drop away to almost zero
- the Conclusion—when interest picks up again.

Other names for these three parts of a training session are the Beginning, the Middle and the End.

In a well-planned session the three parts blend smoothly into each other, and each have their own purposes.

In the Introduction or Beginning of a session the trainer is trying to focus the trainees’ attention by:
- describing the topic and its main points;
- reminding them of what they already know about this topic;
- outlining the new things they are going to learn in this session;
- outlining the activities they are going to do in this session;
- encouraging them to think positively about what’s coming;
- showing how the information and the skills are relevant to their job.

In the Body or Middle part of a session the trainer is trying to keep the trainees interested and actively involved in the topic by:
- presenting new information as interestingly as possible;
- presenting new information in short bursts;
- having activities they can do;
- having discussions;
- asking questions;
- having a short break.

In the Conclusion or End of a session the trainer is again trying to focus the trainees’ attention, this time by:
- giving a summary of the main points;
- telling them what they learned;
• linking this session with any other sessions they are doing later;
• giving them feedback on what they did during the session.

A session plan is basically a set of notes prepared by the trainer to show in logical order what they want to happen in a training session. Plans are usually written out roughly to start off with, then fixed up and made neater later.

Why do trainers make and use session plans?

• They give the trainer and the trainees a clear idea of what you are doing.
• They are a record of the training sessions the trainer has taken.
• They are useful if another trainer has to take over the training.
• They give the trainer a starting point if they have to do the training again with another trainee.

Every trainer, even an experienced one, uses a plan. For the new trainer things can go wrong if they try to run training sessions without a plan, things like:

• time is lost because steps are missed out;
• trainees get frustrated because they feel lost;
• equipment isn’t set up or doesn’t work when you need it.

Now we’re going to have a go at writing out an Introduction and a Conclusion to a training session. Then later we’ll look at planning for the Body of a session. Speaking bluntly, we could say that the Body is where you find the ‘guts’ of the session, so it needs a lot more detail and takes longer to think about and write out.

Planning the Introduction to a session

With a new group, spend a little time telling the trainees some things about yourself and establishing a friendly atmosphere. Some trainers have a short statement they can say about themselves and the experience they have had with the training topic. They use it to introduce themselves to every new group, making changes as appropriate.

Let’s look again at the purpose of the Introduction part of a training session. Even though it may only take five to ten minutes, the Introduction is vital because it is your first opportunity to grab and focus the trainees’ attention by:

• describing the topic and its main points in an interesting way;
• reminding them what they already know about this topic;
• outlining the new things they are going to learn in this session;
• outlining the activities they are going to do in this session;
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Five things to include in your Introductions:

- encouraging them to think positively about what's coming
- showing how the information and the skills are relevant to their job.

If the Introduction doesn't raise the interest, curiosity and enthusiasm of the trainees, the rest of the session may as well not take place.

Use the letters of the word, GLOSS, to remind yourself of the five things to include in your Introduction.

G = Grab your trainees attention.
L = Link the new things in this session with something they already know about.
O = Outcomes: tell the trainees the training outcomes of the session.
S = Structure: tell the trainees what will be happening in the session.
S = Stimulation: encourage and motivate the trainees to be involved.

When you are planning what you want to say in your Introduction these five separate points might seem a bit disjointed but after you have practised them a number of times they will all flow together smoothly.

The following examples may give you some ideas about different ways these five points can be mentioned in an Introduction. The examples are pretty long because they put in all the words that the trainer would say.

Examples

Trainer 1—beginning a one-to-one demonstration session

Well Des, this is your first time at training on this section of the production line, isn't it? As we go along you'll get a feel for the way the bottles enter the line and move along to be filled. Today we'll focus on two things. First—making sure the entry point of the bottles on to the line is unobstructed, and second—monitoring the speed of the line so we don't get bottle jams.

In the section you usually work in you check the labels before the bottles are packed, don't you? Have you ever noticed any bottles not quite full to the correct height? Well, they should've been picked up in our section. It's part of our job here. Anyway, I'm going to spend the next ten minutes just operating the line as I normally would. Stay with me and watch carefully everything I do. Then I'll slowly go over anything you want me to and you can ask questions. After that you can have a go at checking the entry point is clear and checking the line isn't going too fast or slow. I'll watch and give you feedback. Does that sound like a fair thing?
Trainer 2—beginning a group demonstration session

The topic we’re doing today is how to attach the trim to the interior panels. We’ll be using a five step method—position, flatten, glue, attach, check.

In our last session we learned how to use the glue gun and you all did well in your practice sessions through the week.

The two things to think about in this session are: keeping the right tension on the fabric and making sure not to catch the fabric on any metal parts.

First I’ll give a silent demonstration at normal speed and then a slowed down one with explanations and comments.

Then we’ll have half an hour to practise in pairs—one doing and one observing until each person has had a couple of tries. I’ll be walking around giving help when needed.

After you’ve all practised we’ll have a fifteen minute feedback time for comments about how you went and when we can arrange practice sessions. I feel sure you’ll all handle today’s work really well.

Trainer 3—beginning a group theory session

Who likes arguments? No one probably likes them but sometimes we have to handle customers who seem to be trying to have one with us.

In our session this morning we’re looking at ways to resolve conflict with angry customers.

Remember what we learned in the role-plays yesterday about explaining our policies to new customers: always be polite; make sure your information is accurate; speak in a pleasant voice; and seek assistance when you need it. Well, they are just as important in today’s topic.

As well as these we’ll be look at a couple of strategies for clarifying the problem, understanding the customer’s point of view, and finding a solution that suits the customer and our company.

Firstly we’ll read a set of questions I’ve put on the whiteboard, and you’ll each choose one question to answer. Then we’ll watch a video of some conflict situations and each person will look for information that will help them answer their question.

After the video we’ll move into groups of three to discuss the answers. Then we’ll spend the last fifteen minutes writing on the whiteboard the most helpful points about each question. You won’t need to copy these notes down today because we’ll go over the points in our next session.
Activity 14

Select a topic, subject or task you know well from your workplace.

Think up an Introduction for a session of your choice and then write it in the space left at the end of this activity.

You can do this in any way you like, for example:

- working with a partner and thinking out loud so you can hear each other and give feedback before you each write out your own;
- brainstorming on note paper everything you think you’d say in the Introduction then making a final copy;
- writing your Introduction using a comic strip style with speech balloons containing what you’d say;
- making a tape of anything you think you’d like to say, then sorting out the parts you want to write;
- role-playing the situation with another person a number of times, changing as you go until you feel happy about what you’d say, then writing it;
- discussing with your facilitator what you want to say to help you work it out before writing it.

Keep this space for your final copy of your Introduction. Make your rough notes on separate sheets and attach them to this page.
Planning the Conclusion of a training session

The Conclusion part of the training session gives the trainer the chance to:

- remind the trainees of the training outcomes they covered in the session;
- give each trainee some constructive feedback information about how they went during the session;
- show the trainees how the information and skills in this session relate to their future training sessions or work situation.

These three aspects will give the trainees a useful summary of the session as well as helping them remember the main points and feel confident about their progress.

The word you can use to remember the three aspects of your Conclusion, is OFF—as in Signing OFF.

O = Outcomes
F = Feedback
F = Future

Example

Trainer 1—ending a one-to-one demonstration session

The main things we did today were checking the entry point was clear and monitoring the speed of the line to stop bottle jams. I reckon you picked those things up pretty well—especially looking for likely jams. The way you kept your eyes roving over the whole line was good. It helps you get a feel for which bottles might be slipping or sticking. Don’t forget your practice session this afternoon with Andy. Then in our next session tomorrow you’ll have a go at checking the fill height of the bottles. That should be pretty easy for you Des. You’re doing well.

The way this is written it sounds as if the trainee can’t get a word in edgeways. But in real life the trainer would be encouraging the trainee to ask questions or make comments at any time or about any part of the session.

When you prepare the GLOSS and OFF points for what you intend doing in a session, they should be taken as a guideline, not a script. They are there to remind you of the things you want to cover with your trainee—they don’t dictate the exact words you have to say.
Activity 15

Look at the training plans in Appendix B to get some idea of what they contain. You’ll notice that the amount of space is not very large for the Introduction and Conclusion. This is because most trainers, when they become experienced can put down what they want to say in simple points or key words. However trainers need plenty of practice to get to that stage.

Write out a Conclusion to the same session that you planned the Introduction for.

____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________

Have a go at turning your Introduction and Conclusion, into a short list of main points. The following example might help. It’s a short version of the Introduction to the assembly line training.

First time—don’t worry Des—practise later
Bottles enter, moved, filled, checked—Checking fill height
Me—operate line for 10 mins—Des—watch & ask afterwards
Des—operate some points on line—Me—feedback

____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
Activity 16

Ask the training staff in your organisation if they can show, and give, you copies of the training plans they use. They may also have training resources, such as manuals, journals or books that you can borrow to find other styles of plans.

Discuss with them the advantages and disadvantages of different plans and their reasons for choosing the plan they use. Start thinking about the style you prefer.

Planning the Body of a session

As we mentioned earlier, the Body part of a session plan is more detailed. And the details are very different depending on the type of session you are delivering—a skills session or a theory session.

Skills sessions and theory sessions

Skills sessions have a 'hands on' feel to them and can also be called demonstration sessions. At the end of a skills session the trainees have to use their new knowledge and skills to DO a physical task, such as:

- *operate* a photocopier
- *drive* a forklift
- *cut* a client's hair
- *cook* sausages.
Theory sessions have a ‘thinking’ feel to them. At the end of a theory session the trainees have to use their new knowledge and skills to THINK or SPEAK, such as:

- identify problems on the assembly line
- discuss safety in the workplace
- describe what went wrong with the machine
- explain to a customer the benefits of using the product.

The Body of your plan is greatly influenced by the way you train people. Because of this it seems useful to look at training methods and activities for a moment and then come back to writing the Body part of a session plan later.

**Training methods and activities**

Over time each trainer usually develops their own way of training. They will often combine a number of different training methods and activities to suit:

- the learning outcomes
- the needs of the trainees
- the resources available.

Trainers use a wide range of training methods and activities during the Body of each session. In these examples we use the word *method* for referring to something the trainer does, and the word *activity* for something the trainees do.

1. The trainer presents information to the trainees by using methods such as:
   - presentations
   - explanations
   - demonstrations.
2. The trainees apply this information by using activities such as:
   - discussions
   - skills practice sessions
   - games
   - written exercises.

3. The trainer and trainees summarise the information by using techniques or activities such as:
   - reports
   - blackboard lists
   - games
   - handouts.

4. The trainer questions to check the trainees’ understanding of the information or the skill.

5. The trainer observes to check the trainees’ competency in using the information or carrying out the skill.

Activity 17
Discuss with other people in your organisation who do any training, which methods and activities they use.

OR
Ask your facilitator for information about a range of different training methods and activities.

OR
Find and read articles or books that describe different training methods and activities.

The following points may be a useful guide during this activity.

- Does there seem to be a standard training method or does it seem most trainers invent their own?
- What things are common to most session plans?
- What activities are commonly used during training sessions?
- What training aids and resources are useful?

Make your own notes of anything you find interesting or useful from these sources.
We'll now go on to look in some detail at a training method for skills sessions, then move on to theory sessions. As you read through the descriptions take note of where the following five steps that were mentioned earlier, occur.

1. Presenting information
2. Applying information
3. Summarising information
4. Questioning to check the trainees’ understanding
5. Observing to check the trainees’ competency

The Demonstration Method: A training method to use for skills sessions

The most popular training method for sessions where the trainees have to learn new practical skills is the Demonstration Method. The demonstration method is very successful for situations where the trainees have to learn a new skill that can be broken down into steps. This method can be used for the whole session if the skill is long and complex, such as:

- operating machinery on a production line
- giving a facial massage
- applying a plaster cast.

However it can also be used in a shortened form if, during a training session you have to demonstrate a simple skill such as:

- cutting a lemon into wedges
- putting on a hair net
- using a fax machine.
This training method has six stages and they can be adapted in a number of ways:

- to let you spend as much or as little time on each part as your trainees need;
- to suit one-to-one training as well as group training.

If you are demonstrating simple skills, then each stage might only take a minute or two. If you are demonstrating long and complex skills then each stage could take five or more minutes.

For this method to be successful the demonstrator must be:

- very experienced at the workskill, task or job;
- able to break down the workskill, task or job into steps.

Activity 18

1. As you read through the six stages of the Demonstration Method think about and make a list of some of the different work skills in your organisation that it could be used for.

2. Select a work skill that you are very familiar with and list the steps that make up this skill.
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3. Select a simple work skill that you are not familiar with and list the steps that make up this skill. You may have to find out these skills by:
   • watching
   • questioning
   • reading.

The six stages of the Demonstration Method

Stage 1 Give a short spoken overview of the whole skill.
Stage 2 Demonstrate the whole skill silently and at normal speed.
Stage 3 Demonstrate again, slowly, and describe each step.
Stage 4 Check the trainees understand any new information.
Stage 5 Observe the trainees as they perform the skill.
Stage 6 Check that the trainees’ performance meets the appropriate standards.

Before you begin the demonstration make sure that you have prepared everything you could need to carry out the demonstration. This important step is sometimes overlooked.

For example, have you got ready:
   • the demonstration area;
   • the machinery;
   • protective safety clothing for you and the trainees to use;
   • safety equipment;
   • a copy of the company SOPs, safety sheets, manual, for this task;
   • extra supplies and materials;
   • tools;
   • cleaning gear;
   • the paperwork, forms or records that need to be done;
   • pen and notepaper.

Some things to check before you start the demonstration:
Topic 1  Preparing a training session

Stage 1  Give a short spoken overview of the whole skill
- In the overview tell the trainees that you'll give:
  - first a silent demonstration at normal speed;
  - then a slowed down demonstration with explanations and comments;
  - then a time for them to practise.
- Show a high quality example of the product they are working on if appropriate.
- Find out what the trainees already can do and know about the task. It is important not to waste time on a part of the job they can already do.
- If this skill is part of a longer process, explain briefly what happens before and after the part they are learning.

Stage 2  Demonstrate the whole skill silently and at normal speed
- Make sure the trainees can see everything you do. Don't do any actions that are not part of the skill you are demonstrating.
- Don't tell the trainees anything during this step. Let them concentrate fully on watching your actions.
- Make sure you follow all safety procedures to the letter. Include cleaning, maintenance or storage procedures only if they are a necessary part of the skill.

Stage 3  Demonstrate again, slowly, and describe each step
- Do each step again slowly and tell the trainee everything they need to know about each step as you do it.
- Explain any jargon or special words that are commonly used in this job for the tools, supplies, machinery, etc. They may never have heard them before.
- Let trainees get the feel of certain things if this helps them learn, eg dials, buttons, handles, supplies, temperature, texture and aroma, as long as there is no safety risk.
- Point out the things that need checking at certain steps of the process, eg dials, meters, gauges.
- Point out particular signs that tell you things are going well, eg sounds, vibrations or odours.
- Explain to them the special clues that help you know when things might not be going well and when something needs checking before you can continue. These are the moments when, eg the action changes speed or direction.
- Show them how to be on the lookout for anything unusual happening, eg odd noises or machinery sounds, overheating, irregular movements, wrong colour, speed, size.

NSDC Commonwealth of Australia 1995
• Encourage the trainees to ask questions. Answer all their questions with a positive attitude and make sure they have understood the answer.

• Draw simple diagrams of the steps of the skill if you think this will help. Encourage them to make their own diagrams or notes if they want to.

• Show them how to complete any paperwork that must be done with the task.

Stage 4  Check the trainees understand any new information

• Ask the trainees to describe to you everything that you did at each step of the demonstration.

• Do the demonstration again but before you do each step get the trainees to tell you exactly what to do.
  - Do only what they tell you. However, don’t follow an instruction if you can see that it will be dangerous. If they give you a wrong instruction, explain or show what could have happened if you had followed it.
  - Tell them if any of their instructions are in the wrong order.
  - Praise them when they are doing well with their instructions.

• If you have a group of trainees, another way to check understanding is to ask for a volunteer to do a demonstration.
  - This strategy allows the trainees who are confident about the process to test out their skills. It also gives extra demonstrations for the less confident trainees to check how well they understood what is required.
  - The volunteer describes each step to the group before carrying it out.

Stage 5  Observe the trainees as they perform the skill

• Help the trainees feel at ease and try to make sure they have a positive experience the first time.

• Give positive, non-threatening and easy to understand feedback about their progress.

• Encourage them to concentrate on each step and to check their own performance as they go.

• Ask questions about what they are doing, and answer any questions they have.

• Encourage them to talk to you about their own performance as they go.

• Correct any mistakes they make and encourage them to believe they can learn from their mistakes.
• Tell them any common difficulties in the task and how to overcome them.
• Point out how an operator can tell when things are going right or wrong with the job.
• Go through the steps slowly again with individual trainees as needed.

Stage 6  Check that the trainees' performance meets the appropriate standards

• Ask the trainees how well they thought they did. Listen attentively and comment encouragingly on their own personal assessment.
• Give them constructive feedback about their competence. If you need to include some negative feedback use the following strategy. ‘Sandwich’ the negative point by telling the trainee a positive point, before the negative point, and then another positive point.
• Go over what the industry standards are again. Show the example of a high quality product again if possible, pointing out where theirs differ.
• Show them what reporting procedure they need to follow when something goes wrong.

Activity 19
Talk through the following questions on the Demonstration Method with a partner or in a group.
1. What are the benefits of initially demonstrating the skill at normal speed?
2. Why is the initial demonstration done silently?
3. How might the trainees feel if they didn’t know you were going to give a slower, step by step demonstration after the initial normal speed demonstration?
4. What are the benefits of having volunteers demonstrate the skill?
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5. What are the benefits of having the volunteers describe each step before they do it?

Jot down some of the responses you found useful during the conversation.

If you feel unsure about any of these questions check them out with the information given in the original description of the demonstration method or discuss them with your facilitator.

The points given in each stage of the Demonstration Method are suggestions about what a trainer can do during the demonstration sessions. You may want to read through them all and then choose the ones you think will be useful in your session. If you are running a number of demonstration sessions of the same skill to the same trainees then you can vary each session by focusing on different ones for each stage.

Each of these stages can be seen in the example of a plan for a skills session given in Appendix C. One plan has been completed using the example of giving a demonstration of how to park a forklift, and there is a blank plan for your use or modification.

Remember that there is no one type of session plan that is considered to be the best. As you begin to make and use your own plans you will gradually develop a style of your own. Your plan will succeed if it:

- describes the learning outcomes clearly
- outlines the methods and activities you will use
- is easy to understand
- is quick to refer to during your training session
- helps YOU when you are delivering your training sessions.

An effective session plan:
A training method to use for theory sessions

In today's workforce people are expected to deal competently with a lot of different types of information. As a trainer you may have to plan and deliver theory sessions about a wide range of topics, such as:

- product information
- safety requirements
- health and safety statistics
- company promotion materials
- customer relations
- communication skills
- telephone skills
- letter writing.

Even when the training is focused on learning a new skill there may be new information that the trainee will need to know.
Activity 21

Think about these skills:

- parking a forklift
- washing a car
- taking a photo
- operating a VCR
- bowling a ball
- cooking a steak
- operating an automatic teller machine (ATM).

Select two of these skills and brainstorm at least three points of information that the learner would need for each skill.

Example

<table>
<thead>
<tr>
<th>Skill</th>
<th>Information points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cooking a steak</td>
<td>heat of the hot plate</td>
</tr>
<tr>
<td></td>
<td>how different types of seasoning can help</td>
</tr>
<tr>
<td></td>
<td>advantages of different utensils</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Skill 1</th>
<th>Information points</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Skill 2</th>
<th>Information points</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Discuss your lists with others in your group.

Because the trainees have to learn information, many of them seem to think that theory sessions are always boring and the trainees don’t do anything active—they just listen to the trainer. But that doesn’t have to be the case, as we’ll soon find out.
Theory session plan

The same three part structure of a session plan, Introduction, Body and Conclusion, can be used and adapted to suit the special needs of a theory session.

To use this structure for planning an interesting theory session, it’s helpful to take the following steps. Even though they seem to be long and involved now, after you have practised doing them a few times you will find that the steps get quicker and easier.

Introduction

- Prepare a motivating Introduction.

Body

- Decide what information the trainees need to have to achieve the training outcomes.
- Divide this information into ‘bite sized chunks.’
- Put these chunks of information into an appropriate sequence.
- Prepare a number of activities that give the trainees an opportunity to use the chunks of information in similar ways to how they would be doing it in the workplace after the training.

Conclusion

- Prepare a rounding-off Conclusion.

We’ll now explore each of these steps in detail.

Prepare a motivating Introduction

As we saw previously, it is crucial that you spend time planning a motivating Introduction, especially for sessions with a lot of theory.

Trainer 1

‘Today’s session is on budgeting. You will find a description on page 35 of your text. We’ll read through it together then I’ll answer any questions you have about it.’

Trainer 2

‘How would you like a holiday in the sun, or a new car? The best way to do this is through budgeting. Today’s session will look at some of the key factors in maintaining a budget and you’ll be able to apply them to a number of case studies and to planning your own finances immediately.’

After you have practised doing them a few times you will find that the steps get quicker and easier.

Compare the Introductions by Trainers 1 and 2 and choose the one you think is more interesting.
Activity 22

1. Select a topic or subject that you might have to train people in and write a training outcome suited to this topic.
   
   **Topic:**

   **Training outcome:**

2. Write an Introduction that you might give to the first training session on this topic. Use GLOSS if you find it helpful.

3. Show your Introduction to three other people and ask them for feedback.
   
   Write down a few of the feedback points you received.
Planning the Body of a theory session

Most of the 'work' happens in the Body of a session. As we saw earlier a simple way of planning the training methods and activities for this section is to use the following steps to guide what you write.

- The trainer presents the new information or guides the trainees towards finding it for themselves.
- The trainees apply or use the new information in an appropriate activity.
- The trainer or trainees summarise the main points of information.
- The trainer asks questions to check that the trainees understand the new information.
- The trainer observes the trainees to check they can use the new information.

These steps can be repeated as often as necessary depending on the trainees' needs and their rate of progress.

The information the trainee MUST KNOW

On any topic or subject there is:

- a certain amount of information that the trainees MUST KNOW to achieve the training outcomes;
- other interesting information that the trainees COULD KNOW about the topic if there was time—but is not vital in helping them achieve the training outcomes.

Trainers usually try to consider all the information about the topic they want to present to their trainees and then carefully select the items the trainees MUST KNOW to achieve the training outcomes. If there is time over then some of the COULD KNOW information can be presented.

The following activity is very long because it asks you to carry out several tasks and then, to give you an idea of what is required, includes an example of each one. It might be useful to read through the whole activity before you start on the tasks.
Activity 23

1. Use the same topic and training outcome that you wrote your Introduction for.

2. For two minutes brainstorm all the information you can think of on your topic that would help your trainees achieve the training outcome.

Example

Topic—Security procedures for reducing theft or damage
Training outcome—Explain how the security procedures used by floor staff in the sales area can help reduce theft or damage to the stock.

List from brainstorm:

- cash register area always staffed or in view
- don't accuse customers of shoplifting
- plan sales area layout well
- greet customers early to establish personal contact
- be aware of customers' unusual behaviour
- be polite to customers
- know who to report theft to
- always keep walkways clear
- always keep prime display areas in view
- never display cash
- tidy the stock regularly
- fill in damage report forms
- always keep entry and exits in view
- don't use phone when customers present
- maintain appropriate stock levels
- call for extra staff if very busy
- make sure sales area always staffed
- move around sales area regularly
- maintain regular stock checks

3. Underline each item of information that the trainees MUST KNOW to achieve the training outcome.

- cash register area always staffed or in view
- don't accuse customers of shoplifting
- plan sales area layout well
- greet customers early to establish personal contact
- be aware of customers' unusual behaviour
- be polite to customers
- know who to report theft to
- always keep walkways clear
- always keep prime display areas in view
- never display cash
- tidy the stock regularly
fill in damage report forms
always keep entry and exits in view
don’t use phone when customers present
maintain appropriate stock levels
call for extra staff if very busy
make sure sales area always staffed
move around sales area regularly
maintain regular stock checks

Now it's your turn.

Topic

Training outcome

Brainstorm

Underline the MUST KNOW items
Grouping and sequencing this information

Now that you’ve decided on the information that the trainees MUST KNOW the next steps are to:

- put the information that seems to go together, into groups
- sequence the groups into the ‘right’ order
- break the amount of information down into a series of ‘bite sized chunks’ that the trainees could handle in the training sessions.

The way you decide on how much information each chunk should contain will depend on how much new information you think the trainees can take in at one time.

As a rough guide, a person can comfortably take in about 10-15 minutes of new theory information at one time. This amount would form one chunk of information. After that they need to go back over the information in some active way to see how it applies to their work situation and to make it stick in their memory.

The next activity is an extension of the previous one and goes through the tasks of:

- grouping the MUST KNOW items of information that you underlined;
- sequencing the items within the groups that you’ve made;
- sequencing the groups into the order you intend presenting them;
- deciding on how much information to put into each chunk.

How do we know what the ‘right’ order or sequence will be?

Here are some ways of working out how to sequence the information:

- most important information, to least important information;
- information you need most often, to information you need least often;
- familiar information to unfamiliar information;
- simple to complex;
- in the sequence that the process takes place;
- in the job performance sequence;
- in a problem solving sequence.

Now let’s continue on with the same example that we used before.
Activity 24

Look at all your underlined MUST KNOW items of information.

Group the ones that seem to go together.

List them in the sequence you want to present them to your trainees.

Example

Training outcome—Explain how the security procedures used by floor staff in the sales area can help reduce theft or damage to the stock.

- plan the sales area layout well
- cash register area always staffed or in view
- always keep prime display areas in view
- always keep entry and exits in view
- always keep walkways clear
- greet customers early - establish personal contact
- be aware of customers' unusual behaviour
- make sure sales area always staffed
- call for extra staff if very busy
- tidy the stock regularly
- maintain regular stock checks

---

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The next thing to do at this stage is work out how many items of new information can be presented in each 10–15 minute chunk in the Body of the session.

One way to do this is to picture yourself in the training session with your trainees.

What are the main things you want to tell them about each item?

Imagine how long it would take you to cover all the things in each item—1 minute, 5 minutes, 10 minutes?

How many items could you fit into a 10–15 minute chunk?

**Activity 25**

*Work out how you would chunk your information.*

*Example*

*You'll notice that two items of COULD KNOW information have been added at this stage because in the planning this trainer thought there would be enough time.*
First chunk—15 minutes

plan the sales area layout well - why?
cash register area always staffed or in view
always keep prime display areas in view
always keep entry and exits in view
always keep walkways clear

Second chunk—15 minutes

greet customers early—establish personal contact - why?
be aware of customers’ unusual behaviour
make sure sales area always staffed- why?
call for extra staff if very busy

Third chunk—15 minutes

tidy the stock regularly- why?
maintain regular stock checks

Added items of COULD KNOW information

maintain appropriate stock levels
move around sales area regularly
**Selecting appropriate presentation methods**

In this course we use the term presentation methods to mean the things the trainer does to present new information to the trainees. There are many ways that trainees can take in new information. Sometimes the trainer will want to directly tell them the information and at other times it might be more appropriate for the trainees to find it out for themselves.

The following assortment of presentation methods can cater for both situations.

<table>
<thead>
<tr>
<th>Presentation Method</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audio tape</td>
<td>Trainees listen to taped information (e.g., from radio, seminars, training programs, workplace meetings)</td>
</tr>
<tr>
<td>Case study</td>
<td>A detailed example of a work situation or problem is presented for discussion and resolution.</td>
</tr>
<tr>
<td>Demonstration</td>
<td>An expert shows and tells the trainees how something happens (e.g., experiment, using a model or real objects).</td>
</tr>
<tr>
<td>Excursion</td>
<td>The trainees visit a location that provides a wide range of information (e.g., site visits).</td>
</tr>
<tr>
<td>Guest speaker</td>
<td>A guest speaker is invited to talk to the trainees about their area of expertise.</td>
</tr>
<tr>
<td>Interview</td>
<td>An 'expert' is asked a series of questions in front of an audience.</td>
</tr>
<tr>
<td>Pictorial</td>
<td>Pictures, photographs, diagrams, graphs, wall charts, slides, OHPs, etc. are shown to trainees as a way of presenting information.</td>
</tr>
<tr>
<td>Printed word</td>
<td>The trainees read information from a range of written learning resources (e.g., books, newspapers, magazines, white board, handouts).</td>
</tr>
</tbody>
</table>
Preparing a training session

Research presentation
A trainee researches a topic and then presents the findings to the group, using learning aids if appropriate.

Talk or modified lecture
The trainer talks about the subject to the group of trainees, for approximately 10-15 minutes. During or after the talk, the trainees apply the information in an activity.

Video
The trainees watch a video and answer a set of questions they have been given or discuss certain aspects.

Reflection
Discuss as a group which methods you've had some experience of.

See if the group can work out and write a few comments about:

- which methods are the most and least popular
- why some methods appeal more strongly than others
- which methods you might choose for your trainees.

When trainees become familiar with different presentation methods they may even begin to suggest for themselves the ones they find the most useful to learn from. This is a way to cater for individual differences in your trainees' styles of learning and involve them in the planning of the session.

Selecting appropriate learning activities

We're using the term learning activities to refer to the different ways that the trainees can actively do something to apply the chunks of new information that have been presented.

Early in a training course the trainer will select the most appropriate ones for the trainees, but after a while the trainees can begin choosing and organising for themselves the ones they want to use.
To help your trainees feel motivated to join in the activities they will need to understand there is a link between:

- the training outcomes of the session
- the information that has been presented to them
- the chosen learning activity.

Here, in alphabetical order, is a range of learning activities. You can use them just as described or modify them in all sorts of ways to suit you and your trainees. When selecting an activity to use or modify ask yourself the following questions.

Does this activity:

- help the trainees achieve the training outcomes?
- help the trainees understand and remember the information?
- help the trainees apply the information in ways that are similar to real work situations?
- overcome learning barriers?
- meet the trainees' needs?
- use equipment, resources and a location that are easily available?

Use your creativity when you are thinking of activities for your trainees. They will appreciate it because everyone likes something a little out of the ordinary every now and again.

**Brainstorming**
Trainees think up lots of ideas about a topic without making any judgement of them.

**Buzz pair**
You and the person alongside you have a short discussion or brainstorm.

**Debate**
Two teams consider the pros and cons of a topic.

**Discuss in pairs (then fours)**
Trainee selects a partner and they discuss an issue for a short time (then join with another pair to compare ideas on the issue and discuss it further).

**Game**
A short fun event that usually involves words and actions to achieve its learning outcome.

**Group discussion**
A number of people, with or without a leader, discuss a topic, and sometimes give a report of the discussion.
### Making scale model
Trainees follow specific instructions to create a small version of a real object.

### Oral report
One trainee tells the whole group the results of a small group discussion or brainstorm.

### Problem solving exercise
The trainees are given a real or simulated problem from the workplace and use the new information to solve the problem.

### Quiz
Questions are pre-set (by the trainer or trainees) for an oral question and answer session with the group.

### Role-play
The trainees, and at times the trainer, act out situations related to the topic.

### Survey
Trainees ask a group of people certain questions, then the answers are examined in some way.

### Written report
The trainees write about the topic for a particular purpose.

A successful activity will:
- motivate the trainees;
- keep trainees actively involved;
- give you feedback on how well the trainees understand the new information;
- help the trainees remember the main points;
- give the trainees a chance to apply the information in a work-like way.

### Activity 26
Talk about these activities in your training group and see which ones most people prefer. Find out more about any of them that you think you might like to try using.
Summary

As a way of summarising let's put together a rough plan of a one hour theory session.

In this session the trainees are learning a number of important details that they have to use to answer customer enquiries.

Introduction

The session starts off with an Introduction which uses GLOSS as a guide.

Body

First Presentation step

We'll then use a presentation method to give the first chunk of new information. Let's say it'll be a short talk of 10-15 minutes.

First Activity step

This is followed by a 10-15 minute learning activity. For instance in this activity the trainees will:

- decide on three main points that came out of your talk
- discuss their three points in groups of three
- write their comments on large sheets of paper
- pin them up around the room
- walk around reading everyone else's comments.

First Summarising step

The group decides on the most common three points and each trainee writes them down.

Second Presentation step

Next comes the second chunk of theory information that has to be presented. Our presentation technique will be a photocopied page that the trainees read.

Second Activity step

In the learning activity this time the trainees will:

- read the handout
- think of two questions that they want to ask about the content
- form a circle
- take turns to ask their questions and the whole group works out the answers
- facilitator clears up any errors if they occur.
Second Summary step
The facilitator summarises by repeating the most relevant questions and briefly recalling the main points of those answers.

Conclusion
We use OFF as a guide to our Conclusion which pulls together the main points of the session and leaves the trainees with a feeling of success.

Lastly we’ll mark on our plan our approximate idea of:

- the appropriate points to monitor trainee progress;
- any learning resources we’ll need;
- the type of evidence we would want to gather to prove competence.
Learning outcome 2
Deliver a training session

Assessment criteria
2.1 Provide a learning environment which facilitates trust and mutual respect.
2.2 Present the session in a structured manner, including an Introduction, Body and Conclusion.
2.3 Modify session delivery as required based on trainees' feedback and learning needs.
2.4 Provide trainees with constructive feedback and encouragement during the session.
2.5 Use questions appropriately.

Learning outcome 3
Monitor the trainees' performance

Assessment criteria
3.1 Discuss with trainees their readiness for assessment.
3.2 Collect evidence of competent and consistent performance of the training outcomes.
3.3 Notify trainees when the required standard of performance has been reached.

Topic introduction
Well—this is it! This is where you have to carry out a training session—where you put your plans into action.
As the trainer you’re the person whose task it is to keep a handle on where the whole session is heading, how it’s flowing along and whether it’s successful. This is where you have to stitch together the Introduction, Body and Conclusion, so that everyone feels comfortable and there aren’t any loose threads.

The main things we’ll look at in this topic are how to:

- develop mutual trust and respect with your trainees;
- present the new information to the trainees;
- carry out the activities that apply the new information;
- monitor the trainees’ progress;
- encourage and give feedback to the trainees;
- use open and closed questions;
- gather evidence of satisfactory performance by the trainees;
- tell the trainees when they have reached the required standard of performance.

Developing mutual trust and respect

The very first session with every new group is perhaps the most important session of all. From the first moment of any course the trainer must begin creating a learning environment that encourages feelings of mutual respect and trust.

A sense of mutual respect or joint partnership between the trainer and the trainees can be created by recognising that while the trainer has certain skills and knowledge, so does each trainee. If the individual abilities of each person are valued and used in a supportive way the whole group benefits and the learning experience is enriched for everyone. This two-way approach respects the contributions that each person in the training group can make and acknowledges that everyone has something from which others can learn.

A sense of trust and safety is essential in a training group because learning will not happen easily when the people in the group are concerned that things they say and do might be gossiped about, laughed at or judged. For your first few sessions you will be under observation by each trainee to see how you respond to everything the other trainees do and say.

At the beginning of your course each new trainee will have several questions racing around in their mind—and until these are answered with a YES, their attention will not be fully focused on the subject matter you are presenting.
Will your training be done mainly with one trainee or with a group of trainees? In both situations you need to create a learning environment which shows the trainees that you believe in mutual trust and respect between the trainer and each trainee—as well as among trainees.

**One-to-one training sessions**

Individual, one-to-one training sessions most often use the demonstration method for presenting new skills and information. The things that happen in this method were explored when we introduced the six step demonstration method earlier in this module.

**Group training sessions**

Group work, almost by definition, means that people need to get along together to achieve certain tasks. Communication and cooperation between the members of the group become key factors in success.

People won’t automatically communicate openly with each other just because they form a group. They may see themselves simply as a collection of people gathered in a room for a training course. It will take some time and effort, on your part and theirs, before they feel OK about disclosing information about themselves to you and to each other.

Try to develop a balance in your sessions between:

- encouraging trainees to work with others in small groups;
- recognising when trainees would benefit from working individually,
Responding in the learning environment

This is something you will be doing every minute you are delivering a training session — with words, eye contact, a reassuring pat on the shoulder, a brief nod and smile. Your responses are part of the learning environment. Are they helping to create a positive or a negative one?

Even when the trainees are busy doing an activity and don’t seem to notice you, they will be affected by:

- your body language (eg tapping your fingers on the table)
- your tone of voice (eg a long sigh)
- your facial expressions (eg a slight frown)
- the way you move around the room (eg pacing quickly up and down).

**Reflection**

*Set yourself the goal of improving the way you respond to the people you come into regular contact with, eg at home, at work, your friends. Sometimes, (unfortunately) these are the very people we end up responding to with the least effort or sensitivity.*

*Observe yourself during the coming week and reflect on the times when you responded really well to someone and the situation became more positive.*

Presenting the new information

The main aim of this step of your session is to make sure that the trainees are given each chunk of new information as they need it. There are many ways that this can be done, including:

- the trainer tells or explains the information to the trainees;
- the trainees read the information in books, handouts, articles, brochures;
- the trainees watch a video or listen to a tape;
- a guest speaker talks to the trainees.
Activity 27

Have you ever presented information to a person or a group? Discuss your experiences with the other trainees in your group.

List under the following headings any other ways of presenting information that you think would be useful.

One-to-one training | Group training
---|---

Presentation skills

When talking to a group or even one trainee, there are a number of things to keep in mind. These include your:

- posture
- movements
- facial gestures
- eye contact
- voice.

Here are a few simple points about each of them for you to reflect on.

Posture

- Stand straight but in a relaxed way.
- Point your feet towards the group with your weight evenly balanced.

Movements

- Try not to sway as you talk.
- Your hands become an important part of any presentation. Use them naturally rather than trying to keep them totally still.
- Don’t put your hands in your pockets.
- Pulling the ear lobe is a movement that some people do and are not even aware of.
Facial expressions

- A natural smile works wonders—however a pasted on smile will not be very convincing.
- Excessive blinking and twitching your eyes will be distracting to the audience.

Eye contact

- It is usually accepted that when a person is talking to a group, the person will make eye contact with members of the group from time to time. However if you focus on one person in the group for too long they will become uncomfortable.
- Some people do not feel comfortable making eye contact at all. And with others, if you don’t make eye contact with them you are likely to increase the barriers to communication. As we will see later in this topic, cultural background may influence the use of eye contact.

Voice

- The aim is to have a clear, strong voice and not speak too quickly.
- Sometimes when people have to talk to a group they speak in a monotonous voice where their tone doesn’t go up and down naturally. This can be caused by anxiety which makes the muscles of the chest and throat less flexible and restricts the flow of air. Standing a little taller and taking a few deep breaths will lift the rib cage and help release the tension in the muscles.
- The volume of your voice will depend on the circumstances of the training location. It can be part of your introduction of yourself to ask your audience if they can hear you.
Activity 28

Over the next few days try to become aware of any presentation mannerisms you have that might cause distraction to your trainees. Ask for feedback from friends, family, co-workers and others in your training group on these aspects.

OR

Give a three minute talk on a subject you know well, to a small group of people. Ask for feedback on your:

- posture
- movements
- facial gestures
- eye contact
- voice.

Write down any improvements that you could make to your presentation style.

Carrying out the activities that apply the new information

The next step is for the trainees to carry out an activity or a short series of activities which help them to:

- understand the new information
- use the new information in realistic ways
- see how they could transfer the new information into their work situation
- remember the new information.

The trainees will always be looking to see that there is a match between what they are asked to do in the activities and what they will need to do when they are assessed.

To make sure this match is there, the trainer needs to keep the action word of the training outcome squarely in mind during the activities.
Example

Training outcome:
Discuss the reasons for wearing protective clothing when working with hazardous chemicals.

Presentation step
- Trainer gives copies of the OHS&W manual to trainees.
- Trainees find and photocopy the relevant pages.
- Trainees read and highlight the relevant sections.
- Trainer asks questions to check their understanding.

Activity step
- Trainees in pairs list the pros and cons of not wearing protective clothing.
- Trainees read aloud their pros and cons so the trainer can check their understanding.

(If the trainer finds that most of the trainees are having difficulty understanding the information then another presentation step is needed. For example, trainer reads aloud the main points of information, writes them on the board and clarifies them.)

Continuing the activity step
- Trainees (in threes) role-play a worker, a supervisor and an OHS&W officer discussing the reasons for wearing protective clothing when working with hazardous chemicals.
- Trainer moves around checking that the trainees are using appropriate communication skills during the discussion (e.g. clarifying the main issues, taking turns to speak, not interrupting, listening to other speakers, sticking to the topic, being aware when emotions were clouding the issue).

As this shows, the activity steps are sequenced so that they lead up to the final discussion. Just think—if the trainees had carried out every activity except the last one they would not have had the experience of actually discussing the topic. They would only have had the experience of listing the pros and cons.

Then, if their assessor wanted to assess them by observing them having a discussion, they would have been at a disadvantage because they wouldn’t have actually ever had to show someone that they could discuss the issues. If they had only listed the pros and cons then they could only have been assessed at their competency in listing them.
Activity 29

Look through a couple of pages of your industry standards or curriculum and see if you can find outcomes that start with:

- Discuss ...
- Describe ...
- Identify ...
- State ...
- Outline ...
- Explain ...

Discuss with your trainer and your group what these words mean. Write down a few brief notes about the meanings.

---

Activity 30

Look back at your training plan, select a chunk of new information and write out an appropriate presentation step and activity step.

Show your work to several others in your group and ask for feedback.

Arrange with a small group of people (e.g., from your course, from work, or home, friends) for you to use them as guinea-pig trainees and try out your presentation step and activity step with them.

---

Monitoring trainees’ progress

All trainees are interested in how well they are doing and it is part of your role as a trainer to know how and when to give constructive feedback. We’ll cover this in two sections:

- monitoring trainees’ progress
- encouraging trainees and giving them feedback.
Monitoring trainees’ progress

Imagine yourself barbequing a wonderful topside. You don’t just slap it on the barbie then go off somewhere and do something else, hoping that when you come back it will be perfectly done.

You stand beside it, and treat it with the utmost care and consideration. You take notice of every spit and hiss it makes, knowing that it’s trying to tell you what it needs. ‘Should I turn it now?’ you ask yourself. ‘Does it need a little less heat? Perhaps I should put some seasoning on it now? What about pressing or poking it to see if it’s done?’

Good cooks know what signs to look for to tell them that their steak is doing well—and trainers can gradually learn the signs each trainee sends out that might be saying:

- I need some more information now.
- Give me some constructive feedback.
- Help me with this part.
- Stand back now and let me have a turn.
- I need you to check out how I’m going.
- I’d like another practice session.
- I think I’m doing OK, don’t you?

To start off with, there will be some moments during each training session when it is quite obvious that the trainer should be talking with the trainee about their progress.

For example:

- when a trainee looks confused
- when some new equipment is mentioned
- after a new skill is demonstrated.
Another strategy that can help the trainer decide whether the trainee is competent is to ask some ‘what if’ questions about the skill or information they have been learning.

For example:

- What should you do if there is a sudden power failure?
- What might happen if a piece of the metal flew into the machinery?
- What would be the first thing you’d do if you noticed a burning smell?
- What steps would you take if you ran out of materials half way through a run?
- What happens if the red light comes on?

This allows the trainees to let you know whether they could handle unusual situations that might arise.

Activity 31

Brainstorm with a partner some other times you think these moments for checking might be.

OR

Ask if you can observe someone giving a training session. Pay particular attention to how they tell the trainees about their progress during the session.

After the session ask the trainer what things they look for that indicate the trainees’ performance is becoming more and more competent?

List some of these.

Ask some ‘what if’ questions

Topic 2 Delivering a training session

Workplace Training
If a trainee just doesn't seem to be able to reach competence within the scheduled training time do you know what the follow up procedure is? Are they given additional time for such things as:

- re-training?
- more practice?
- extra assessments?

You will need to know what options are available to your trainees in case one of them worries because their rate of progress is not the same as other trainees and they ask you what they can do about it.

Encouraging trainees and giving them feedback

Encouragement and feedback can be:

- verbal (by using words)
- non-verbal (by using actions).

It is very important that everyone feels comfortable with the forms of encouragement and feedback that you use. Check that the non-verbal forms are acceptable. This can be done by:

1. being very aware of the ways that you encourage your trainees and give them non-verbal feedback;
2. finding out whether the things you do might be resented, embarrassing or rude.

For instance, do you use touch or eye-contact?

Examples

**Touch**

In some cultures touching of any part of the body is not acceptable, so a trainer could not use a pat on the shoulder to indicate, 'Well done.'

Some people do not accept being touched by members of the opposite sex.

Some older people do not accept being touched by much younger people.

**Eye contact**

Some cultures consider it non-respectful for young people to have lengthy eye contact with older people so be aware that this could be the reason why certain young trainees are hesitant to maintain eye contact with you for long.

Some people are embarrassed by intense eye contact between members of the opposite sex.
Activity 32

Have you noticed any areas of discomfort that have arisen between trainers and trainees that might be due to differences in cultural background?

Take a little time to find out if other trainers in your workplace have had experiences like these and make a few notes about how they handled the situations.

Verbal feedback is most commonly given in spoken word form, however in some circumstances you may have to fill in a form or write a short report about a trainee’s progress.

Your trainees need verbal feedback about their progress because it helps them look at the weak spots in their performance and work out ways of overcoming them. As you observe them during the training session, choose certain times to pass on to each trainee your comments about their progress.

Not everyone feels totally comfortable giving feedback. Sometimes positive feedback is hard to give because we don’t want the other person to get a ‘swelled head’ and negative feedback is hard to give especially if it has to contain some comments about things that are not ‘up to scratch’.

The important thing is that all feedback should be constructive—meaning that we give it so the person can use it to build themselves up and move forward, not pull themselves down and move backwards.

Examples of feedback given during a session.

Positive feedback

‘That’s good. I like it. Well done.’
Positive constructive feedback

'That work looks good. There aren’t any marks on the material, the edges are straight and there aren’t any gaps. Well done.'

Negative feedback

'That work’s terrible. What went wrong? It looks awful.'

Negative constructive feedback

'I notice you’re having some trouble holding the material off the floor and you’ve got some marks on it. Let me show you again how to do it. Also the edges are a bit crooked. This sometimes happens when the tension doesn’t match the thickness before starting. Do you want to have another go at checking the tension screw?'

When you are asked or expected to spend some time giving feedback to an individual trainee after a training session, the following four part model is helpful.

1. Ask the trainee what they think/feel they did well.
2. Ask them what they would do differently next time.
3. Add constructive feedback about the things not covered by the trainee, both positive and negative.
4. End on a positive note.

We’ll look later at a few activities that can help us give feedback to other people.

The following list outlines eight aspects of giving feedback. The memory jogger of capital letters spelling FEEDBACK should help you remember them when you want to give feedback to your trainees.

Feedback ‘sandwich’

Feedback should always begin on a positive note, so find something that you can say that was successful. Then if you have a negative piece of feedback to give, ‘sandwich’ it in between the positive points. Give positive points first, then negative, then finish with another positive.

Esteem

How will the trainee feel about themselves after you have given them your feedback? Will they still feel respected and capable, or will they have become defensive, frustrated and low in self-esteem?
Help the trainee to see your feedback as a form of encouragement to do their own personal best, rather than as blame or judgment.

Environment
Choose an appropriate time and place to give the feedback. Also check that you have dealt with any of your own negative emotions which could create an uncomfortable climate when you speak to the trainee.

Does the learner understand?
Check that the trainee understands what your feedback means by asking them to repeat it back to you in their own words. This will also help them to acknowledge and remember it.

Be honest and sensitive
When the trainees’ performance is not up to standard it is your responsibility to give them constructive feedback. Although this can be difficult you must not avoid giving negative feedback when it is necessary. Be tactful as you identify specific issues and help the trainee work out what went wrong and what to do about it.

Actions - not the person
When you need to give negative feedback, focus on the things the trainee did, rather than on how you feel about them. For instance, you might say, ‘You turned the blade too much to the left’, rather than ‘You were pretty careless when you turned the blade’.

Confidentiality
Show the trainees that you respect them by giving your feedback to each individual in private. Make sure that you can’t be overheard or that any written feedback you give won’t be read by anyone else.

Keep it short
Don’t overload the trainees with more feedback than they can use. Check by asking yourself, ‘Is this the most helpful piece of feedback this person can use, or am I saying too much?’
By using these strategies yourself, and encouraging their use during and after your training sessions you will be creating a learning environment where people feel at ease with each other.

**Activity 33**

Find and prepare a short technique, activity or game that develop openness, trust and respect among the group members. These types of activities are useful as ice-breakers.

Arrange with the facilitator for the group to do one each day, led by the trainee who prepared it.

After each one, the trainee who presented it gives the reasons for choosing it and the benefits it has. The group gives feedback about:

- how effective they thought it was
- whether they think they’d use it when they are trainers.

Briefly describe two that you particularly liked.

The purpose of including these types of activities and games in a training program is to work on creating an atmosphere of mutual trust and openness in the group. This will help everyone feel more comfortable about giving and getting feedback.

As group members you can all help each other become more capable trainers by sharing your understandings and insights about one another’s skills.
Receiving feedback

Even though we might feel nervous at the idea of it, we all need to know other people's versions of how we come across—because our version may not be complete. If we want other people to be openly honest with us, we have to make it safe and comfortable for them to do so. We must learn to accept feedback with an open mind and a closed mouth. We don't gain anything by trying to blame someone else or justify what we did or said as soon as the person has told us their feedback.

If the feedback is something which can be dealt with easily and quickly, for example, 'A few of us find your voice is not loud enough when we are working in groups', then you can increase your volume the very next time you have group work.

If however, there are more long term implications in the feedback, for example 'A few of us find your lecturing style can be a bit boring', it's time to sit down with the people involved and together work out a plan for overcoming the problem.

A few points that can help when receiving feedback:

- thank the giver and respect their openness (and courage);
- value their comments and their point of view;
- clarify it with them by paraphrasing or repeating it without being defensive;
- reflect on the feedback and whether you think it is reasonable;
- check it out honestly with others, rather than relying on this one source only;
- if it is reasonable, act as soon as you can, to deal with the problem;
- if it is not reasonable, work through the issue with the giver;
- learn from the experience;
- model this process for your trainees.

Activity 34

Think back to a time when you received some positive feedback. Write a few comments in response to these questions.

How was it given?

How did you feel about the person giving it?
Workplace Training

Topic 2 Delivering a training session

What was your response?

________________________________________

Think back to a time when you received some negative feedback.

How was it given?

________________________________________

How did you feel about the person giving it?

________________________________________

What was your response?

________________________________________

Reflection

Do you feel comfortable enough in this training group you are participating in to give feedback to others and receive it from them?

________________________________________

Encouraging trainees to assess their own learning

Even though your feedback is very helpful and necessary for your trainees to know how they are progressing during their training, it is just as important that they learn how to assess their own progress when you are not around. There are certain techniques that can be used in self-assessment and if your trainees learn to use them now they will be able to use them throughout the rest of their working lives.

Techniques for self-assessment can include:

• asking other trainees for feedback during training;
• asking co-workers on the job for feedback on specific aspects of their performance;
• discussing their workplace progress with their supervisor;
• seeking follow up sessions with their trainer to discuss their performance;
Topic 2  Delivering a training session

- reflecting on their own progress during and after the sessions;
- keeping notes of the things they felt went well, the things that didn’t and ways they could improve;
- setting personal goals for improving at certain tasks;
- finding someone to talk to about ways to improve;
- learning from mistakes.

Activity 35
Choose a couple of these techniques and try, during the next week, to put them into action for yourself about this course. Write briefly about how helpful you found these techniques for your own self-assessment.

Using open and closed questions
Questioning is an essential skill for trainers to become confident at using.

Activity 36
Why do you think trainers ask questions?

There are lots of reasons for asking questions. These days they are not used just for testing someone’s knowledge. They could be used:
- to focus attention on a certain topic;
- to encourage interest;
- to promote activity;
Open questions encourage the trainees to give a more detailed answer.

Workplace Training  Topic 2  Delivering a training session

- to check on and extend the trainees’ understanding;
- to slow down or speed up the pace of a training session;
- to challenge the trainees to think more deeply;
- to assess the trainees’ progress;
- to encourage the trainees to think about unusual aspects of the work.

The questions a trainer asks are either thought up in advance of the session (pre-set) or arise during the session.

Let’s look at two types of questions that trainers use during their sessions:

1. closed
2. open.

Closed questions

Closed questions are usually answered with ‘Yes’ or ‘No’ or a very short statement. Be careful when you use this type of question with trainees who are a little shy or feel anxious. They may not feel confident to add anything further to their simple answers and you might never find out their real depth of thinking.

The speed and tone of voice are very important with these sorts of short, closed questions because it is easy for nervous trainees to interpret them as being abrupt or even rude.

Examples
- ‘What tool should be used in this situation?’
- ‘Where do the off-cuts go?’
- ‘Do you know how to drive a sit-on mower?’

Open questions

Open questions cannot be answered with ‘Yes’ or ‘No’. They are used to encourage the trainees to give a more detailed answer usually containing their own feelings or opinions. They are very useful with a new group because they bring out a wide variety of responses and can get a group discussion started.

Examples
- ‘Would you like to tell us what you know about this type of machine?’
- ‘How do you think temperature might affect the end product?’
- ‘Can you outline the advantages of using a computer instead of pencil and paper for recording these details?’
Let's look at two different trainers using questions during their first session with a new group of trainees.

Trainer A asked a new group the following question.

'Who did metal work at school?'

Without realising it, this closed question could be implying to some trainees in the group that they will be at a disadvantage if they didn't do metal work at school.

Trainer B asked a new group the following question.

'What background do any of you have in metal work?'

This open question encourages the trainees to talk about any metal work experiences and skills they have, and allows them to feel that a wide range of different backgrounds is accepted.

Activity 37
Think back to one of the session plans you worked out in Topic 1 and make up three closed and three open questions that you might use during the session.

Closed questions
1. __________________________
2. __________________________
3. __________________________

Open questions
1. __________________________
2. __________________________
3. __________________________
Workplace Training

Topic 2 Delivering a training session

Reflection

During the coming week take special notice of the sorts of questions that you hear. Look at the response of the people who are receiving the questions.

Also be aware of the sorts of questions you ask. Are there any times when the interaction becomes confused or negative between you and the person you're talking to?

Write a few thoughts that came into your mind as you reflected.

Techniques for answering trainees' questions

When trainees ask questions in a training session you can respond in a number of ways depending on the situation.

1. If you think the trainee has done quite a bit of thinking about the question before asking it, you can encourage them to try to answer it themselves, for example 'Do you have any ideas yourself about what the answer might be Tony?' This gives you feedback about the trainee's line of thinking and their understanding of the topic.

2. If you think another trainee in the group should have a pretty good chance of handling it you can redirect the question to another trainee, for example 'I think Pat did some reading about that last week. Would you like to tell us anything you know about it Pat?'

3. If it's a question that you want all the trainees to focus on you can redirect the question to the whole group to answer, for example 'There's a lot in that question. Does anyone want to respond to any part of it?'

4. You can provide or recommend a resource for the trainee to research the question, and bring an answer back to the group later, for example 'The latest copy of Technology in the 21st Century has an article about that. I've got it in my office and you can borrow it if you like. Maybe after you've read it you could use it as your five minute group presentation next week, Greta.'

5. If the answer is fairly simple you can hint at it. The extra clues may stimulate all the trainees to think more broadly and possibly come up with an answer, for example 'There are four of them being used in this room—does that help?'
6. You can give an answer that provides factual information, expresses your own opinion or lets the trainees know that you don’t have an answer but are happy to look further into it later with them.

**Gathering evidence of competent performance**

Throughout the training sessions the skills and knowledge of the trainees gradually increase and develop. Finally the time comes when the trainee and the trainer both see the trainee as being competent.

This means that the trainer knows the trainees have achieved all the training outcomes, and the trainees themselves know they can achieve all the training outcomes—but how does anyone else (e.g., an assessor) know that the trainees can achieve all the outcomes?

- Their competence has to be seen.
- The training outcomes have to be observable.
- What the trainees can now do has to be made obvious.

This means that evidence of the trainees’ competence has to be collected.

**Activity 38**

If you were delivering one of the training sessions that you planned in Topic 1 how would you collect evidence of the trainees’ competence?

Write out the training outcomes, the methods of collecting evidence and the type of evidence you would be collecting.
Learning outcome 4
Evaluate a training session

Assessment criteria

4.1 Gather feedback from trainee(s) about whether the training outcomes of the session(s) were achieved.

4.2 Identify and use strategies for evaluating the participant's own performance.

4.3 Modify the training session plan using feedback and self-evaluation.

Topic introduction
Let's look at two questions that can help when you want to evaluate your training sessions.

1. Can the trainees now actually apply the new skills and information in a way that satisfies the original training need?

2. Were the techniques and activities you used in your training course the most effective ways to help the trainees achieve the training outcome?

To answer the first question, you'll need to look back at the original training need. It may have related to aspects such as:

- unacceptably high reject rates;
- low productivity;
- non-standard work practices;
- too much down time.

From here you'd have to find out whether the performance of the trainees after the training was closer to what your organisation expected than it was before the training. Does their current performance now show, for example:

- less rejects?
- higher productivity?
- standard work practices?
- reduced down time?
To find out about the current performance of your trainees you’ll need to gather information from their workplace. This may include:

- looking at performance charts;
- reading work reports;
- observing actual work performance;
- discussing their work performance with supervisors or co-workers;
- other (describe)

During some of these methods you may have to ask for feedback from a range of people. Sometimes it is not easy to ask for feedback especially if it is not something that the people in your organisation do regularly.

If you model an open attitude to receiving genuine feedback from anyone involved in your training program they will soon begin to offer it when you ask. They know you value their feedback and intend to use it to when planning your future sessions.

The second question is perhaps easier to think about because it is probably something that you are doing for the training course you are now participating in.

Examples

- Have you been questioning any of the activities you are asked to do in this course?
- Do you find that you want to discuss the relevance of the examples given?
- Have you thought that, if you were the facilitator of this course, you’d present some of the information differently?
If your answer to any of these questions is YES then you are evaluating this course. And so you should be! Good on you!

The double edged sword comes into play when you realise that your trainees will be evaluating every session that you plan and present to them.

Don’t be put off by this—because your trainees’ thoughts and ideas can help you in a number of ways. After you reflect on the feedback you gather about your training sessions you can use it to:

- improve the way you deliver your training
- make changes to the time allocations
- find solutions to problems
- modify the activities you use
- find more relevant resources
- offer different kinds of support
- increase the participation of the trainees.

It’s useful to gather feedback at the end of each session so that you can think about whether you need to make any changes to your next sessions. In some organisations the trainers are required to pass on all or some of the feedback they receive from their trainees. This may be to help management make decisions about whether to continue the training as is, change, increase it, decrease it or stop it altogether.

Activity 39

Tick the things that your enterprise expects you will do with feedback.

☐ listen to or read it and reflect on it
☐ use it to modify your planning or delivery of training for next time
☐ pass it on to your workplace training supervisor
☐ discuss it with your workplace training supervisor
☐ show your workplace training supervisor how you intend using it to modify your training programs
☐ report it to your trainees’ supervisor
☐ write it up as a report
☐ file it as part of the records
☐ other (please specify)
Feedback can be gathered in a number of ways

Written questions

These questions can be made into a form that the trainees fill in. In situations where the trainees are shy or anxious this can help because they don’t have to speak directly to you and may choose to be anonymous.

Examples

Do you think the course was too long/ too short/ just right?
Was the information relevant to your work situation? YES/NO
Did the activities help you achieve the outcomes?

☐ almost always
☐ usually
☐ sometimes
☐ seldom
☐ never

Did you find the information:

☐ much too difficult
☐ difficult
☐ about right
☐ easy
☐ much too easy

Written comments

This method is looking for a chatty style of written answer. It uses open questions to try to encourage comments that give information you might not have received by using closed questions.

Examples

Do you feel you fully achieved the expected outcomes of this session?
What were the most useful parts of the session?
What were the least useful part of the session?
How would you suggest the session could be improved?
How have you benefited from this session?
Topic 3  Evaluating a training session

Oral questions
You ask a set of questions about your training session and listen to the answers. If you know that you want to refer to the exact information later you can either tape or write down the answers.

Examples
Did you think the second activity went on for too long?
Was the Introduction motivating enough?
Do you feel the trainees understood the new information?
Did you find the summary useful?
Was there enough time for practising the new skills?

Oral interview
This is similar to the oral question session, however you want it to be more like a chat. After one or two questions to get the ball rolling you encourage the person to be more conversational about how they felt the training session went.

Examples
How would you rate the session on a scale of 1-10 where 1 is terrible and 10 is excellent?
Can you give some reasons for your rating?
What would need to change for you to raise your rating?
Can you comment on how useful the session activities were in preparing you to use your new skills and knowledge in your workplace? How could they have been made more useful?

Activity 40
Discuss these methods for seeking feedback with your training colleagues at work and note down the ones they have used and found helpful.
Who can you ask for feedback?

A trainer who is keen to improve will seek feedback from:

- current trainees
- previous trainees
- colleagues.

Feedback from current trainees is helpful for obvious reasons. Their comments relate directly to how they feel and what they think about the training program and about your skills.

However they may still feel too connected to you during or immediately after the training program to give you a well considered, objective viewpoint.

Feedback from previous trainees is also very helpful too, because it can:

- offer you objective feedback (but it may be out of date if you no longer use the same training methods and activities as you did with them);
- tell you if something you did with them that they didn’t appreciate at the time has proven to be very useful now;
- give you information now about what they wish you had done with them during their training with you.

The sort of questions you could ask your previous trainees could include:

- What would you have liked there to be more or less of in the course?
- Using what you now know about the workplace, how realistic were my case studies?
- If you could change one thing about my course what would it be?

Reflection

If you receive a fair amount of feedback indicating that there are certain problems with the training, you will have to work out an approach to resolving them.

Have you been in a situation where you have received a significant amount of negative feedback about one of your training sessions?

How did you handle it? What did you do with the feedback? Who did you go to for assistance with resolving the problem? Write a few comments in general response to these questions.
Topic 3  Evaluating a training session

Your colleagues in this instance, will be other people in your organisation who are asked to carry out training. Discussing things with them can be helpful in several ways, because you can:

- show them your plan and ask if they can see any obvious weak spots;
- invite them to observe you delivering your session and then ask them for a professional opinion;
- debrief with them immediately after a training session, especially if something ‘went wrong’ and you want to talk about it;
- go to them after you have reflected on your session and discuss how you are thinking of modifying it.

Self-evaluation

Self evaluation is a bit like having an internal conversation with yourself. It can take place during your training sessions as you reflect on how things are going and can help you make instant changes to your plan in response to the situation.

It can also take place after your sessions when you ask yourself more in depth questions about whether there are any things you need to change or any problems you need to solve.

During your self evaluation the trick is to make sure that your inner voice is constructive not destructive.

The following questions are the kind of self-reflection that is worth doing after you have delivered a few sessions.

- Did I take into consideration, or overlook, barriers to learning?
  For example:
  - I expected reasonably high reading, writing and maths skills, but several trainees couldn’t handle the level of work.
  - I thought they’d all be able to operate a lathe, but three couldn’t.
  - I planned to go on a tour of a chemical plant but two are asthmatics and would be affected by the fumes.
- Did I spend enough time establishing and fostering a safe learning environment?
  - Did the trainees and I feel we could mutually trust and respect each other?
  - Was the feedback able to flow freely during the session?

The following strategies for evaluating your own training sessions can be time consuming to set up but are extremely helpful if you are keen to improve.

- Arrange to tape or video yourself delivering a session. Watch yourself with a critical, but gentle, eye and look for ways that you can improve your skills.
- If you feel confident watch it with a colleague and ask for their feedback as you go through it.

- Put your video away for several weeks and then look at it again, taking particular notice of the aspects where you have now changed.
- Select several areas in which you want to improve. Make another tape or video of yourself and try to improve in these areas. When you watch the video later only judge those aspects of your performance that you were working on.
Learning outcome 5
Communicate and maintain information about training session(s) as required by the enterprise

Assessment criteria
5.1 Discuss and carry out with appropriate personnel the preparation of the training session, location and resources.
5.2 Notify the appropriate personnel when the trainees have reached the required standard of performance.
5.3 Record relevant information about the trainees who have completed the training session(s).
5.4 Provide information about training session(s), including budget details if required, to appropriate personnel.

Topic introduction
For many trainers the most interesting aspect of training is the time they spend interacting with their trainees in the training sessions. This is where they feel the action is taking place.

But trainers can’t forget that training programs don’t just happen out of the blue. There are always a number of behind-the-scenes administrative and liaison tasks that support every successful training program. So each trainer needs to get to know all about these background tasks and the people who will be involved.
These tasks relate to the preparation and coordination of each aspect that makes up your whole training program, such as:

- personnel involved in the program in any way
- location(s) where you want to hold the training
- learning resources you intend using and making
- records you have to complete
- costing procedures you have to follow.

If we look briefly at each of them in turn you’ll get an idea of how to make sure you can handle them in your organisation, where relevant to your situation.

**Personnel**

It almost goes without saying that the most important person to keep in contact with is your trainee. However it can sometimes slip our mind how often we need to contact them out of their regular training session times. There are many other situations when a trainer needs to talk things over with their trainees.

Try to help your trainees feel comfortable about discussing with you their needs and fears about their training. If they feel at ease with you they will be able to learn more easily and apply what they learn later. They might be having problems which could affect how well they are progressing or even whether they want to continue with the training.

In the mind of the trainee, one of the most important times for you contacting them is when you tell them they have finally reached the required standard of performance.

Unfortunately however, some trainees do not satisfy the requirements during their assessment and therefore are not deemed to be competent. If this happens in your situation you will need to think carefully about how you would handle it.

**Activity 41**

Brainstorm as many situations as you can where you would need to contact a trainee out of regular training session times.

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<td>Brainstorm as many situations as you can where you would need to contact a trainee out of regular training session times.</td>
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Ask yourself, 'Who else do I need to liaise with about any aspect of my training program?' There are three parts to the answer: the people you need to contact; the process for contacting them; and the tasks these people do.

The following lists show:

- people who might help you to plan, deliver and follow up and administer your training program;
- examples of the range of tasks they might carry out.

In your organisation the actual titles of the positions may differ and some tasks may not be relevant. Depending on the size of your organisation some of these positions may not exist and you may be responsible for the tasks.

**Administration clerk helps with:**
- keeping details eg enrolments
- handling general enquiries and correspondence for training
- maintaining training records
- coordinating room bookings.

**Finance clerk helps with:**
- costing the training programs
- maintaining financial records
- organising payments and reimbursements for speakers and trainees.

**Typist/word processor operator helps with:**
- producing handouts, exercises, overhead transparencies
- photocopying materials for trainees.

**Technician and computer expert helps with:**
- setting up any technical equipment before the training sessions
- running the equipment
- attending to problems with equipment during the program.

Compare your list with others in your group.
Subject expert / guest speaker helps with:
- demonstrating skills
- presenting information.

Manager of training department helps with:
- approving the program
- planning and evaluating during and after the program
- providing industry standards and training outcomes.

Other trainers help with:
- running components of the sessions
- advising on training resources you could use
- receiving feedback from trainees
- encouraging you during the program
- debriefing with you after sessions.

Trainees' supervisor or manager helps with:
- determining the trainee’s needs, abilities, interests
- providing information about work standards and expectations
- organising practice sessions
- receiving feedback about the program from the trainee
- giving feedback about the trainee’s improvement in regular work tasks
- determining the trainee’s readiness for assessment.

Trainees' co-workers help with:
- encouraging trainees to do well in their training
- passing on feedback from the trainee about the training program
- supporting trainees in their learning and ongoing practice
- asking the trainees to show them what they learned during the training.

Physical resources/maintenance staff help with:
- fixing problems eg when the windows in the training room won’t open.

Assessor helps with:
- letting you know what form of assessment the trainees will be required to do
- clarifying the types of evidence that are acceptable for proving competence.
Liaising with these people

You will need to keep the people who are assisting you with your training programs well informed about each step where they are involved. It could be worthwhile as part of planning your course to draw up a checklist of all the relevant people, with their contact phone numbers if appropriate. Then mark on it the particular tasks you want them to do before, during and after the training program. You can follow it for each session you do and mark off each task as it’s completed.

It will also act as a prompt for you to regularly communicate with them to encourage and thank them for their help, give and ask for feedback, and have debriefing sessions with them to help you evaluate the program when it has finished.

Activity 42

1. Find out and list the relevant positions, names and tasks in your organisation.

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<th>Position</th>
<th>Name</th>
<th>Tasks</th>
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2. Make yourself known to these people and find out their preferred procedures for:
   - you contacting them
   - them helping you.

3. Describe any procedures you need to keep special note of.
   Example
   Admin clerk: phone contact, needs 3 days advance notice for photocopying.
The following scenarios demonstrate the importance of fully briefing and then keeping in touch with all the people involved when you run a training program.

Scenario 1

Harry headed off to the training room feeling pretty good. He had the key and knew how to turn the heaters on to get the room warm before the trainees arrived. As he turned the corner he saw Meryl, another trainer, just entering the training room he was heading for. 'Oh no!' he thought, 'Has the room been double booked?' His pace quickened as he tried to recall whether he had booked the room. The two trainers collided in the doorway.

'Harry!', exclaimed Meryl, 'Do you know where the overhead projector is? I asked Gerta but she said if it wasn't in the store room she didn't have any idea where it was.' Harry realised it was still in his office. He'd used it yesterday and hadn't returned it ... and he hadn't remembered to fill out a 'loans sheet' for it.

Scenario 2

Leo drummed his fingers on the bench press. 'Where the devil's Phil got to?' he said to himself as he waited for his trainee. 'I'm sure I told him on Monday that I'd meet him here at 2.15 sharp.' This was only his second training session with Phil and things seemed to be going quite well. He hadn't had a chance to see Phil's supervisor yet - that would have to wait until Friday. But he had found the manual for operating the press for Phil to look at after the demonstration today.
Suddenly Leo remembered that he'd left the manual with Tammy the training department clerk for her to photocopy the section on safety procedures. At that moment Phil came running up to him. 'Sorry I'm late. We had an accident on the line and I had to write a report. I asked my supervisor to see if she could get a message to you but she didn't know where to contact you.'

**Reflection**

*Can you remember a time when you were in 'hot water' because you hadn't informed the right people, or followed the right procedure or filled out the right form? Talk about this situation as a group, or jot down a couple of things you'd do differently next time you were in a similar situation.*

When your training program has been completed you may need to give certain people particular information about the results of the training.

The details may relate to such aspects as:
- the numbers of people who started and completed the training
- the length of time the course took
- the rate of progress of particular trainees
- whether there have been any visible benefits from the training yet
- other (please add)

The information you are asked to provide is used for a range of purposes and it can help you in gathering the details if you are clear about what the purpose is. Some of the information might require a fair amount of work to find out and then put together into a memo, a written report or an oral presentation to management. On the other hand you may simply have to pass the details on in a short conversation, a phone message, a note or by completing a form.
Workplace Training  

Topic 4  Administration and liaison tasks

Activity 43
Imagine that you have completed one of your planned training sessions and make some notes on the following four points.

What information are you required to provide?
Who needs to have it?
What do they want to use it for?
What form of communication do they want it in?

Locations
In some organisations the training is always carried out in the same place, and in others the location changes according to the circumstances.

Activity 44
Briefly describe the location(s) you use for training in your organisation.
The following checklist may be helpful when you are thinking about the location you intend using for a training session.

- Directions for trainees to get there
- Keys
- Out of hours access
- Access doors: internal and external
- Heating/cooling/ventilation/windows
- Seating/desks
- Lighting
- Soundproofing
- Safety factors
- Access to break/refreshment areas/toilets
- Access to tools/machinery/equipment
- Access to lockers

Other (please add your own examples)

From this list select four examples that you know the least about. Find out about your four examples and make notes of all the relevant things you need to know and do when running your training.

Example 1

Example 2

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Learning resources

Almost anything can be used as a learning resource - tools, equipment, books, manuals, the products made by the organisation, people, trade brochures, journals and so on. If you find something you think your trainees can use to learn from, it can become a useful resource.

In addition to these suggested resources there are particular items of equipment that many trainers use when conducting their sessions in a training room. These include:

- whiteboard, blackboard
- overhead projector
- computers
- flip charts
- video players
- audio cassette players
- photocopier.

Activity 45

Check out the resources available to you in your organisation and also find out how you go about borrowing, using and returning them. There are likely to be standard procedures you must follow so make sure you are familiar with these procedure before you want to use the resources.

List the resources and equipment you think you are most likely to use and briefly describe the borrowing process.
There seems to be an unwritten law that goes something like this:
The item you want to use will go wrong if you haven't checked what to do if it goes wrong.

Activity 46

Begin a folder of all the information resources that could be helpful to your trainees. Keep the items in plastic sleeves to protect them from getting untidy or marked. Make sure the information is up-dated regularly.

Examples:
- promotional brochures
- posters
- safety booklets
- product information sheets
- product samples
- articles from company newsletters
- diagrams or charts you have drawn up yourself.
As another way of summarising this information use this checklist to help prepare your sessions

1. Do you need to talk with the trainee’s supervisor about what the trainee might need during their training:
   - equipment?
   - break times?

2. Do you have to check that the training space is adequate for such things as:
   - noise level?
   - distraction to other staff carrying out regular work in the section?
   - seating for whoever will be helping the trainee?

3. Sometimes other staff who are not being trained may see this as time off for the trainee that leaves a greater workload for them. If so you may find that the section supervisor asks for, or would appreciate, your help in handling this. Try suggesting:
   - you talk to everyone in the section about the importance of training and how, in the long run, they will be helped by this person being a competent worker;
   - the other workers may like training in any work skills they need;
   - you move the training out of view of the other workers;
   - you see if relief staff or overtime can be arranged to cover the extra workload.

4. Will it be up to you to think about the trainee’s need for on-going practice and assistance during and after the training?
   - Who arranges it?
   - Who checks the standard during the practice?
   - Will an expert be available to help the trainee after the initial training?

5. Will you be performing any demonstrations that are needed? If they need to be performed by another experienced, highly skilled operator can this person provide the theoretical information for the trainee as well as the practical skill, or do you have to?

6. If you use demonstration sessions it is very important that your trainees should be prompt in arriving at the demonstration and returning to their workplace afterwards. Is it your responsibility to make sure that the trainees are on time?
7. What resource materials are you going to include in your training sessions and where do you get them from? These might include:

- safety instructions
- OHS&W requirements
- maintenance reports
- follow up handouts
- diagrams
- SOP manuals.

**Records**

Records are an important aspect of managing your training program because they provide the details that people might have to refer back to in the future. For example:

- a trainee wants to check on their results;
- a new trainer wants to find out how many trainees have completed training in a certain skill;
- the financial section needs to quote some figures about the cost of training;
- you want to look up which staff you can call upon to conduct demonstrations;
- the training manager needs to include in a report the number of people enrolling in a program;
- a supervisor needs to know which trainees have actually attended the sessions.

Each organisation is a bit different so it is important to find out what record keeping systems already exist in your organisation. Are the records kept manually or on computer? Do you know how to record the necessary information for the training you carry out?

**Activity 47**

List the training records which you are required to use in your organisation and make sure that you are quite familiar with the procedures used to record training information. Tick the box to show you are competent with that procedure.

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<th>Training record</th>
<th>Recording procedure</th>
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Costing procedures

It is very important for organisations to keep track of training costs. Training programs will have a much greater chance of being included in next year’s budget if accurate figures of costs are kept this year. This attention to detail can help in two ways:

1. by proving that you have kept within your budget;
2. by providing well-supported reasons why the budget had to be exceeded.

Each organisation handles things differently. Many organisations have formulas for calculating the costs of using a room, or employing a certain staff member at a certain level or other costs that are generally ‘hidden’.
### Activity 48

Check out how much involvement you are expected to have in the costing of any training you do. Make a few notes under the following headings if appropriate.

<table>
<thead>
<tr>
<th>Costing procedure</th>
<th>Am I competent?</th>
<th>Who can help me?</th>
</tr>
</thead>
<tbody>
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Assessment activities

1. This assessment has two sections.

Section 1

Write out a plan for a training session. You must
demonstrate that you can prepare plans for theory sessions
as well as practical sessions. To do this you may either:

- write two plans, one theory and the other skills-based;
  OR
- write one plan combining both theory and skills.

Your assessor will be looking for evidence that the
following criteria have been satisfied in a competent
manner.

Your plan must:

- State the expected training outcome(s).
- Include an Introduction, Body and Conclusion. Use
  GLOSS and OFF if you find them helpful.
- Give:
  - an outline of the main points of information to be
    presented;
  - details of the presentation methods and learning
    activities you intend using;
  - an indication of the sequence of the activities.
- Show:
  - where you would monitor trainee progress;
  - the learning resources you would use.

Section 2

As an attachment to your plan, describe in brief notes:

- the specific training need and how it was determined;
- how the learning activities are appropriate for:
  - the training outcomes
  - needs of your adult trainees
  - your available resources, equipment and location;
- the evidence required for assessment and how you
  intend gathering it.
2. Deliver a planned training session of approximately 15 minutes to a group of no less than five adults. It should be a theory based session rather than a practical skills session.

During your delivery your assessor will be looking for evidence of your competence in the following areas:

- preparing the training area and learning resources you intend using;
- establishing a learning environment of trust and mutual respect;
- presenting the Introduction, Body and Conclusion of the session;
- modifying the delivery of the session according to the trainees' feedback and learning needs;
- using questions appropriately;
- providing constructive feedback;
- encouraging trainees;
- monitoring trainees' progress;
- discussing with trainees their readiness for assessment;
- collecting evidence of competent and consistent performance of the training outcomes;
- notifying the trainees when they have reached the required standard of performance.

You may prefer to be assessed in all of these competencies during the one session or it may be possible to negotiate to be assessed in a number of different competencies over several sessions.

3. Evaluate a training session you have delivered.

You may choose your own evaluation process, however it needs to provide evidence of your competence in the following areas:

- gathering feedback from your trainees about whether the training outcomes were achieved;
- using self-evaluation strategies;
- encouraging trainees to give you feedback about your performance;
- identifying the areas of your performance that need improving;
- using feedback to begin developing an action plan for improving your session plan and delivery skills.
4. Demonstrate to your assessor that you can communicate and maintain all the information required by your enterprise about your training sessions.

This information will include details on the:
- training session requirements;
- training location;
- learning resources;
- trainees who completed the sessions;
- trainees who reached the required standard of performance;
- budget for your session(s).

Your assessor will need to see evidence of how you:
- record all relevant information;
- pass it on to appropriate personnel;
- discuss it with appropriate personnel.
Resources

  
  Very easy to read; contains a range of ideas that are easy to follow and use; based mainly on a training room situation.

- Tanaka, C 1991 *One to one workplace trainer, A national TAFE project for workplace training standards*, Open Learning Training Technologies, Queensland.
  
  A series of booklets to guide the new trainer; contains useful checklists of steps to follow; presents simple case studies with self-check exercises to assess your own progress.

  
  Includes lots of illustrations (many quite humorous) to present the ideas; uses checklists to summarise key points and question/answer sections to clarify issues; not aimed at one to one situation.
Appendices
Appendix A  Working out the skills and information required to do a task or job

Sometimes it can be difficult to figure out all the steps that make up a task and if you aren’t clear about this you might leave out, or, by mistake, mix up some of the steps when you are demonstrating the task to a new person.

Usually the steps of a task are carried out in the same order each time, especially if the task or skill must be performed in a way that meets company or industry standards.

Activity A1

Please do A1.1 or A1.2

A1.1 Find the SOPs, checklist or instruction sheet for a short task or job skill that you do well.

Read them carefully, noticing whether the skill or task is broken down into steps.

Put them aside and see if you can remember the steps of the task in the right order.

Check with the original.

Did you leave out any of the steps? YES/NO

Did you change the order of any of the steps? YES/NO

Did you include any steps that weren’t written down? YES/NO

Did any of these things make any difference to your performance of the skill or task? YES/NO

OR

A1.2 Think about another one of the work tasks that you do well.

From memory write down briefly all the steps of this task.
After you have finished your list, check them against your SOPs or ask your supervisor to check them.

Discuss with a member of this training course or your facilitator if there were any major differences between what you wrote and the actual procedure used in your work area.

What information does the learner need during a demonstration session?

Sometimes when you are demonstrating a skill or task you might feel anxious that you won’t remember everything. So it can be useful to have a few things written down to help you feel more in control.

Because you have to be experienced in carrying out a task before you can train someone else to do it, you will be very familiar with:

- how and why the task is done
- what happens before and after this specific task
- what are the likely results of not doing it properly.

In fact you may know so much about the task that it can be hard working out just what you need to tell or show to your trainees.

Key points of information

Every work task or skill you do has lots of information you could tell a new learner. However you can run the risk of giving your learner ‘information overload’ unless you work out the key points that each learner really needs for each task.

These key points can be written under headings.

The headings are listed below in two groups, one relating to things the learner needs to do during the task and the other to things the learner needs to know about the task.

<table>
<thead>
<tr>
<th>Key points to DO</th>
<th>Key points to KNOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preparation</td>
<td>Equipment</td>
</tr>
<tr>
<td>Carrying out</td>
<td>Supplies</td>
</tr>
<tr>
<td>Maintenance</td>
<td>Quality</td>
</tr>
<tr>
<td>Storage</td>
<td>OHS&amp;W</td>
</tr>
<tr>
<td>Cleaning</td>
<td>Hazards</td>
</tr>
<tr>
<td>Paperwork</td>
<td>Environment</td>
</tr>
</tbody>
</table>
Appendix A  Cont.

Under each of these headings are some examples of the sorts of things to tell the learner about a task, but they are not the only ones that could be included. They are a guide to start you thinking about what is the most important and useful information and experience a learner needs for the task you will be training them in.

To DO list

What preparation is needed before you do the task?
• SOPs
• instruction sheets
• location of power source
• warnings or instructions to other staff
• equipment
• layout of tools.

What does the learner have to do when carrying out the task?
• SOPs
• steps
• hints for competent performance
• how to use tools
• how to use equipment.

Is there a maintenance program for this task?
• SOPs
• out-of-standard performance
• how to use maintenance tools and equipment
• reporting procedure.

What storage requirements are involved after the task?
• location of storage area
• keys to storage area
• correct shifting procedure
• how to use shifting equipment
• recording the storage date.

What are the cleaning responsibilities of this task?
• SOPs
• equipment
• cleaning supplies
• location
• water supply
• disposal of used cleaning products.
Appendix A  Cont.

Is there any paperwork you have to do?
- manual or computerised recording system
- line inspection sheets
- test results
- order forms
- calculations.

To KNOW list
What equipment do you use to do this task?
- vehicles
- machinery
- tools
- instruments.

What supplies do you need to do this task?
- dry goods
- chemicals
- fertilisers
- filters
- glues
- boxes.

What occupational health and safety issues are important?
- safety equipment
- protective clothing
- warning lights
- safety signs
- signals
- line of vision

What potential hazards could arise?
- noise
- electricity
- heat, fire, smoke
- dangerous chemicals
- explosives
- flammable liquids
- wet/slippery areas

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Appendix A  Cont.

How do you make sure that quality is always high?

- sampling
- detecting common faults and problems
- fault and problem reporting procedures
- calibrating and standardising procedures
- working to SOPs
- speed and accuracy
- self-checking

Does this task have any environmental issues?

- waste disposal
- recycling
- water usage
- pollution

A worksheet containing the headings only, has been made for you to photocopy and fill in with details about any task that you are asked to train someone to carry out (see the following page).

Activity A2

Think of a job skill or task that you could be asked to demonstrate to a learner.

Make a photocopy of the worksheet on the next page.

Write the name of the task in the space provided on the worksheet.

Think about how long it normally takes to do this task and write it in.

List under each heading, the key points that you would tell a learner about this task.
<table>
<thead>
<tr>
<th>Worksheet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of task __________________</td>
</tr>
<tr>
<td>Equipment</td>
</tr>
<tr>
<td>Supplies</td>
</tr>
<tr>
<td>Quality</td>
</tr>
<tr>
<td>Preparation</td>
</tr>
<tr>
<td>Carrying out</td>
</tr>
<tr>
<td>Maintenance</td>
</tr>
</tbody>
</table>
## Appendix B  Examples of plan layouts for theory sessions

### Plan 1

<table>
<thead>
<tr>
<th>Title of session</th>
<th>Learning outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Introduction</th>
</tr>
</thead>
<tbody>
<tr>
<td>GLS</td>
</tr>
</tbody>
</table>

### Body  | Main points | Method | Resources |
<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td>Presentation</td>
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<td></td>
</tr>
<tr>
<td>Activity</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Summary</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Presentation</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Activity</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Summary</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Conclusion</td>
<td>O</td>
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<td>F</td>
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<td>F</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Comments</th>
<th>Follow up practice</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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</tbody>
</table>
Appendix B  Cont.

Plan 2

<table>
<thead>
<tr>
<th>General information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title of session</td>
</tr>
<tr>
<td>Learning outcomes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Time (mins)</th>
<th>Main points, methods and learning aids</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td></td>
</tr>
<tr>
<td>G</td>
<td></td>
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<tr>
<td>L</td>
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<td>O</td>
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<tr>
<td>S</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Body</th>
<th>Activity</th>
<th>Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Presentation</td>
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<tr>
<td>Presentation</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Conclusion</th>
<th></th>
<th></th>
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</thead>
<tbody>
<tr>
<td>O</td>
<td></td>
<td></td>
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<tr>
<td>F</td>
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</tbody>
</table>

Comments
Appendix C  Example plan layout for a skills session using the Demonstration Method

<table>
<thead>
<tr>
<th>Training outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preparation</td>
</tr>
</tbody>
</table>

Stage 1 Introduction (short overview)
G
L
O
S
S

Stage 2 Steps | Stage 3 Comments
---|---
1. |
2. |
3. |
4. |
5. |
6. |
7. |
8. |
9. |
10. |

Stage 4 Check trainees understand □ Q1
Stage 5 Observe trainees □ Q2
Stage 6 Check skill □ Q3

Conclusion
O
F
F

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### Appendix C  Cont.

<table>
<thead>
<tr>
<th>Training outcomes</th>
<th>Park a forklift in a safe manner inside a factory</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preparation</td>
<td>Forklift truck; keys; wheel chocks</td>
</tr>
</tbody>
</table>

#### Stage 1 Introduction (short overview)
- Revise knowledge of lowering tines; observe toe down position; give big picture of the process

#### Stage 2 Steps

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Bring the forklift to a stop on level ground</td>
</tr>
<tr>
<td>2.</td>
<td>Check forklift is not blocking traffic or exits</td>
</tr>
<tr>
<td>3.</td>
<td>Make sure the steering wheels are straight</td>
</tr>
<tr>
<td>4.</td>
<td>Lower tines to the ground so the toe is down</td>
</tr>
<tr>
<td>5.</td>
<td>Put transmission in neutral</td>
</tr>
<tr>
<td>6.</td>
<td>Apply hand brake</td>
</tr>
<tr>
<td>7.</td>
<td>Switch off engine</td>
</tr>
<tr>
<td>8.</td>
<td>Remove key</td>
</tr>
<tr>
<td>9.</td>
<td>Alight carefully from the vehicle</td>
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<tr>
<td>10.</td>
<td>Chock wheels</td>
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</tbody>
</table>

#### Stage 3 Comments

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Check for wet or slippery surfaces; make stop smoothly</td>
</tr>
<tr>
<td></td>
<td>Watch lowering speed; check toe position; may need to repeat</td>
</tr>
<tr>
<td></td>
<td>Review gear positions</td>
</tr>
<tr>
<td></td>
<td>Check brakes are fully functioning</td>
</tr>
<tr>
<td></td>
<td>Check key is returned to office and signed for</td>
</tr>
<tr>
<td></td>
<td>Check other traffic in area; watch footing</td>
</tr>
</tbody>
</table>

#### Stage 4 Check trainees understand
- Q1
- Q2
- Q3
- Q4
- Q5

#### Stage 5 Observe trainees

#### Stage 6 Check skill

#### Conclusion
- O
- F
- F
Space for you to use

We have included some blank pages for you to use. You may wish to:

- attach relevant information
- make notes
- write longer answers to activities
<table>
<thead>
<tr>
<th>Borrowers Name</th>
<th>Date</th>
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<tbody>
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School of Centre for Vocational Education Research
Level 11, 33 King William St.
Adelaide SA 5000