

TAEDEL402

Plan, organise and facilitate learning in the workplace

Learner guide

TADEL402





Topic 1

In this topic you will learn how to:

- 1A** Agree on workplace learning objectives
- 1B** Analyse work practices and routines
- 1C** Address WHS implications

Establish an effective workplace learning environment

This topic explains why structured learning may be provided in a workplace, with guidelines and considerations for setting it up.

A learning environment is the combination of the location and characteristics of the setting that impact the learning experience. Learning in a workplace offers learners an opportunity to hone their skills and become 'work ready'. Workplace training allows the learner to practise their skills and knowledge and apply them in the workplace setting. Creating an effective workplace learning environment often requires negotiation and compromise between workplace managers, the trainer and the learners. As a trainer, you must carefully balance the needs of the learners with the requirements of the workplace, while still maintaining the integrity and validity of the training.

1A Agree on workplace learning objectives

Work-based learning is training that occurs in a work setting which is linked to the job role and the work being done. This can be a real workplace or a simulated work environment. This type of learning can cover a multitude of specific and general tasks, from basic office administration to the operation of plant and machinery. The learning objectives can also vary depending on the type of training required, the skills gaps identified and the organisational culture that supports the training. Identifying and clearly establishing the scope and objectives of training is an essential first step in the process of work-based training.



You may be an external trainer who has been provided with the outline of a learning program that has been decided by your RTO supervisor and management at a workplace organisation. You could be a workplace supervisor not connected with VET or an RTO and have the task of planning and organising learning in the workplace. However, you will still need to consult with various stakeholders to understand and verify details of any skills gaps and workplace tasks, processes and policies to negotiate the structure and delivery of training.

Establish objectives

Your first step in establishing objectives is to determine the key people and their expectations in relation to training. This consultation requires communication skills to establish the criteria and objectives of the clients and stakeholders. If the work-based learning is a continuous activity within an organisation, these lines of responsibility will be clearly identified. For new clients, it will have to be established before continuing. The following list describes how each stakeholder may contribute to the establishing objectives.

Workplace supervisor

A workplace supervisor is primarily concerned with the employability and improvement of the learner throughout the training. Objectives from this source may relate to specific skills, knowledge or workplace procedures.

Manager responsible for the work area

As with the supervisor, an area manager may recommend objectives relating to the learner's employability. However, they are generally more interested in how the learner will fit into the work group, and may therefore introduce objectives relating to teamwork and group participation.

Likely or potential needs of the workplace

- ▶ Consider, for example, whether it likely that the learner will be called upon to do a task outside their direct activities. If so, how can the training cater for such contingencies?

Industry knowledge

- ▶ You require some industry knowledge, at least to the extent that you understand the common needs of workers in the relevant industry. Further information can be gained from the learner and/or client organisation.

Organisational requirements

- ▶ Trainees and apprentices will often require specific workplace training on tools and equipment. You must be familiar with these requirements in order to incorporate them into the training.

National competency requirements

- ▶ For example, you may need to know what evidence is required to meet the unit of competency and how the evidence can be gathered from activities in the learner's workplace.

Example

Agree on workplace learning objectives

Joanne has worked as a sales assistant in a retail clothing store for the last six months. The store owners engaged an RTO to provide retail training to all staff with less than one year's experience. The trainer met with the owners to verify the objectives and scope of the training and agreed that:

- ▶ the purpose of training and assessment is to provide staff with national qualifications
- ▶ training can only take place before or after work hours
- ▶ training must be completed within 10 months.

These objectives were then mapped across to the competency requirements of the qualification, in this case a Certificate II in Retail Services. The next step was to confirm these objectives and gain agreement from Joanne and other new staff.

Joanne's requirement to attend training outside work hours was confirmed with the store owners, and they agreed to pay Joanne in accordance with workplace relations legislation. The only further requirement was to ensure the training aligned with Joanne's current and potential job requirements. The trainer sat with Joanne for one hour to go through her job description and create a training plan that incorporated her day-to-day job requirements. Joanne was pleased to learn the training could actually improve her efficiency and improve her future employment opportunities. These factors were incorporated into the scope of the training to keep Joanne motivated and focused on achieving the qualification.



Activity 3

In this activity you are required to apply your knowledge of WHS to your current training environment. For the purposes of this activity, the classroom, workplace or home is your training environment. The learner will be someone wishing to undertake Certificate IV in Training and Assessment in this workplace. Your trainer will be your WHS officer.

Evaluate your training environment by completing the job safety analysis using the sample template.

Summary

1. The objectives of work-based learning can vary depending on the type of training required, the skill gaps identified in the workforce and the organisational culture that supports the training.
2. Before commencing any training delivery, you must confirm the objectives with the learner, workplace employer and possibly the RTO to ensure they wish to continue with the training, are familiar with what may be required, and to establish accountability and responsibility.
3. To effectively meet the requirements of a given workplace, you need to be familiar with the work routines, processes and policies that guide the day-to-day tasks that the learner will undertake.
4. Assessors and trainers must ascertain exactly what the person's job role involves, what equipment they'll be operating and the work setting.
5. Exposing learners to unnecessary risks that lead to harm is a criminal act in all Australian jurisdictions and may result in large fines and imprisonment if the breach is considered direct and serious.
6. You must be aware of all personnel responsible for WHS at your training location. These may include managers, WHS officers, supervisors, first-aid officers and fire wardens.



Topic 2

In this topic you will learn how to:

2A Address contractual requirements

2B Arrange external activities

2C Obtain necessary agreements

Develop a work-based learning pathway

Formal workplace learning can include apprenticeships, traineeships, inductions, mentoring, coaching and cadetships, and is achieved through an agreement between the learner, trainer, regulating body and employer to a set of outcomes that fit the needs and abilities of all these stakeholders.

A learning pathway is documented to provide a guide for each stakeholder on how, when and where the learner will complete the agreed goals. This format depends on the type of learning relationship and the organisational context.

2C Obtain necessary agreements

Before the learning can be implemented, relevant stakeholders need to agree about various aspects of workplace training, as outlined in the following table.

Stakeholder	Aspects of training to agree to
The learner	The timing and obligations they must adhere to during the learning process
The RTO	The support given, materials and resources provided and trainer's obligations
The apprenticeship network provider	The contractual obligations of all parties to an Australian apprenticeship
The trainer (you)	Ensure you have the means and ability to deliver the training in the agreed time and format
The employer/supervisor	Ensure the trainee will have the time and support required to complete the work-based training
Any other stakeholders with contractual responsibilities	For example, establish LLN skills of learners and those required to perform job roles competently

Obtain agreement from stakeholders

Stakeholders have to comply with the required standards and specifications in signed training and funding contracts. Additional aspects of training can be negotiated.

The progress from inception to implementation should take no more than three months to meet the funding requirements of the standard incentives offered for Australian apprenticeships. Typically, the process only takes a few days.

The process involves:

- ▶ organising the paperwork (training plan contract and government-funding contract)
- ▶ developing the learning pathway and individualised learning plan between the trainer and the learner
- ▶ holding a meeting with the workplace supervisor to gain the final sign off.

Implement the learning pathway

Agreement allows you to take the next step of implementing the learning pathway.

Follow these steps to implement the learning pathway:

- 1** Lodge the documentation with the appropriate state/territory training authority.
- 2** Generate copies for the learner and supervisor, and for the learner's file, which is kept with the RTO.
- 3** Ensure the learner has the original copy of their work diary/logbook (also known as a competency record book or work evidence record). This is the document designed for the learner to monitor and mark off their progress through the training.
- 4** Explain the next steps to the learner, which means informing them of their first training sessions and the details pertaining to those sessions.

Deal with contingencies

If stakeholders do not agree on the contract, you should determine where the problems exist in order to progress. An apprenticeship support provider and experienced staff members at your RTO can discuss any contingencies that may occur. Training coordinators in the various state or territory government departments are also a good source of information and advice. Issues can usually be overcome by negotiating changes to the following elements.

There may be room for flexibility in these areas:

- ▶ selection of elective units
- ▶ timing of assessments
- ▶ supervisor commitments, such as the time required by the supervisor to attend to the trainee's needs
- ▶ the amount of time allocated to complete the qualification – this can be negotiated as most Australian apprenticeships and licences operate on a competency-based system, allowing learners to progress more quickly if they achieve their competencies faster.

Non-negotiable areas

Non-negotiable areas include the criteria by which funding is provided. For example:

- ▶ no national qualification is sought
- ▶ the amount of funding is disputed
- ▶ industrial relations or WHS laws are compromised; for example, when the employer requires training to be conducted outside work hours with no pay or in unsafe conditions



Topic 3

In this topic you will learn how to:

- 3A Identify the context for learning and the individual's learning style**
- 3B Select and explain learning techniques**
- 3C Develop and discuss an individualised learning plan**
- 3D Interpret WHS responsibilities in the learning environment**
- 3E Organise appropriate supervision**

Establish the learning-facilitation relationship

The relationship between trainer and learner is central to achieving effective learning outcomes. This means developing trust, rapport and good communication. Establishing boundaries and expectations allows the learner to operate effectively within the training environment and allows the trainer to monitor and adjust their delivery as required. An effective learning relationship is one where these boundaries and expectations are clear, measurable, and in line with the work requirements of the trainee, worker or apprentice.

3A Identify the context for learning and the individual's learning style

Effective learning is a balancing act; the trainer and learner must continually make small adjustments to the delivery, learning style and work tasks. The aim is to stay relevant and to achieve the outcomes set out in the training plan. Knowing how, when and where the learning will take place, and the learner's preferred learning style are all necessary to achieving this balance.

Some learners may not be comfortable with formal ways of learning and an attempt should be made to determine and accommodate how they learn best.



Learning context

The learning context broadly covers the characteristics of the learning environment and the way in which the trainer and learner will interact within the environment. To understand the learning context, you must be able to identify and understand each of the characteristics described below.

Purpose of training

- ▶ This determines why the training is required:
 - Is there a skill gap or a newly created job role?
 - Is it continuation training for existing workers or skills assessments?
 - Is it a combination of these?
- ▶ The purpose of the training will determine your approach to the delivery, choice of location, and the tools and resources you need to complete the training. For example, if the purpose is to retain employees through paid skills and knowledge programs, you may prefer a more motivational approach using on-site training and positive examples from the workplace.

Location

- ▶ The training environment is characterised by the location, which will determine contextual aspects, such as:
 - work health and safety (WHS) requirements, timing and access to the training environment
 - the resources provided in the location and those that must be accessed separately
 - access to colleagues, supervisors and industry specialists.

3C Develop and discuss an individualised learning plan

A learning plan documents the details necessary to complete the learning pathway. It is often included as part of the workplace contract between the RTO, trainee and employer known as the training plan, as much of the detail is required for both. Ensure that you understand the components that make up a learning plan and why they are important for effective workplace training.



The learning plan should be discussed with the learner in detail. They must feel comfortable with the training they are about to receive and the responsibilities and expectations they must adhere to over the training delivery period. For apprenticeships, this may be four years or more. You should encourage the learner to raise any concerns and questions they have during this time so you are both clear as to the expected outcomes and responsibilities. The training/learning plan should include a field where the trainer, learner and RTO sign the document once the learning plan has been discussed.

Prepare a learning plan

Ensure that you differentiate the terminology used in VET. An individual learning plan is not a plan for how you will deliver a training session. Nor is it a learning program. These are both created at the RTO and encompass how the RTO intends to run an entire course. An individual learning plan may begin as either a blank document specifically created for a new learner or as a template used by the RTO to plan the training of an individual apprentice or trainee.

The LLN requirements of a learning program and LLN needs of learners can be recorded on the learning/training plan under a section with information about how additional needs will be addressed, or a separate LLN learning plan can be developed.

Ask your trainer for a template sample 'Training plan'; Aspire has included relevant templates in its *Trainer's and assessor's guide* for this unit.

Components of a learning/training plan are described here.

The context for learning

The context for learning is the location and learning environment in which learning will take place. This should be specific to the individual learner and include addresses, locations within the work area and a description of any classroom-based learning. Other aspects of the environment that influence the learning experience can also be recorded, including social, institutional and geographical factors. For example, the learner may be in a remote location. Information to be recorded includes:

- ▶ whether training will be on the job
- ▶ whether a training room is available
- ▶ any WHS considerations.

The person's learning style and characteristics

The individual's learning preferences and any information about their learning style should be described to allow you to adjust or adapt delivery, and allow learners to adjust their learning techniques as required. Here is an example of a learner's demonstrated strengths and characteristics:

- ▶ Can interpret visual information quickly
- ▶ Can retain information provided in images and text
- ▶ Is happy to work by themselves or with a coach/mentor
- ▶ Prefers not to work in groups
- ▶ Has difficulty with large amounts of data
- ▶ Requires careful observation to avoid safety concerns

Boundaries and expectations of the learning-facilitation relationship

Learner relationships need to be developed to allow for two-way communication, openness, trust, support and encouragement, and to motivate the learner. By discussing and setting clear boundaries and expectations, all parties acknowledge their individual roles and accountability in the process. This is usually documented as a paragraph, table or a series of dot points outlining:

- ▶ key areas of responsibility
- ▶ expected outcomes
- ▶ method and regularity of communication
- ▶ how progress will be monitored.

Documented equity or additional support needs for the learner

Fairness and support for additional needs in VET are requirements under the Australian Quality Training Framework (AQTF)/VET Quality Framework (VQF) guidelines. The learning plan should identify all relevant access and equity support needs as they apply to the learner and the learning context.

Here is an example of how a trainer can identify and document a client's needs:

'Mr Drew will require additional time to complete written tasks to allow for his current level of literacy. Support from the trainer will be provided to ensure Mr Drew understands written questions and can convey his level of understanding of the course content during assessment. This may be done verbally where units of competency allow for such a reasonable adjustment.'

Performance benchmarks to be achieved

For training in nationally accredited qualifications, benchmarks are represented as units of competency or accredited modules. As VET is criteria- and competency-based, all benchmarks have a performance evidence requirement of 'competent' in each task. This is usually represented as a brief description followed by a list of units or modules.

4D Facilitate the learner's transfer of skills and knowledge

According to the experiential learning model, learning requires some level of experience, reflection, conceptualisation and experimentation. Learning a task in one situation without verbal or physical examples of transferability (the application of the skill in other situations) will considerably diminish the learning experience. There are a number of techniques you can use to help learners transfer their skills and knowledge to new situations.



Techniques for skill transfer

When a task is first demonstrated or experienced by observing others in the workplace, the learner will often try to compare what they see and hear with some other experience they have had in their lives. This is how memories are formed and how skills are eventually learnt. But, if they only see or hear something once, the effect is short-lived and the experience is likely to fade from memory quite quickly. You should ensure the skill is learnt in such a way that the learner can transfer that knowledge and ability into different workplace situations; for example, learning to use a hammer drill in one context, such as an outdoor rock retaining wall, then using a hammer drill with the same effect inside a concrete building.

The following outlines some techniques for skills transfer.

Teach across a range of learning preferences

People have different learning preferences. The first technique for improving transferability is to teach across a range of learning preferences. This means that in the case of using a hammer drill, you may use demonstration, instruction, imitation/trial, video clips of hammer drills being used correctly (and incorrectly), and some reading and writing activities to demonstrate knowledge. This gives the learner several angles for their brains to absorb, understand, conceptualise and experiment with the skill. Contrast this with a lesson on hammer drills that is taught purely on paper or just by using one person to demonstrate. Without these added experiences, the transferability factor reduces.

Use multiple learning contexts

The second technique for improving skill transfer is to ensure that learning occurs in two or more learning contexts. A common example is the block training conducted by many trade schools. Apprentices are taught the theory and safety requirements of using equipment, then have the chance to practise the task in a simulated environment at the trade school. After that, they return to their workplace, where they have the chance to experiment with similar equipment in a different setting; for example, it may be a noisier environment, be outdoors, or be part of a different project. The idea is to ensure they can transfer the skill in practice, before needing to apply it during an assessment or in a real work context.

Use technology to support learning

Another technique for improving transferability is using technology in the form of online, visual learning aids and interactive computer programs. This technique gives you the option to use simulated scenarios that stretch the application of knowledge to fit new contexts and situations. This technique can benefit learners when real experience of a task is high-risk or where the skill sets are typically knowledge-based, such as in accounting, office management, IT or finance.

Example

Facilitate the learner's transfer of skills and knowledge

Rholanda is learning the classical guitar. Her instructor is training her to achieve a national qualification in music and understands that her guitar skills must be demonstrated in front of a panel of judges and in his studio. To prepare Rholanda for this experience, he shows her a video of a concert-like experience similar to her assessment. Additionally, he takes her to the hall before the assessment so that she can practise playing the guitar in this environment without the stress of the audience being there.



The experience allows Rholanda to conceptualise the assessment activity and maintain her skills in a different setting. She also has the opportunity to actively experiment with the sounds and scale of performing in the hall. These experiences add to her overall skill level and have set her up for a fine performance when the time comes.

Activity 15

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

Case study

You are the workplace trainer for Beverly, an aircraft maintenance engineering student at Brisbane's civil aviation training facility operated by the Queensland government. Her goal is to work with Qantas or Virgin Australia as an aircraft engineer. These airlines operate a number of different aircraft from several different manufacturers. The course covers:

- ▶ Module 1 – Mathematics
- ▶ Module 2 – Physics
- ▶ Module 3 – Electrical fundamentals
- ▶ Module 4 – Electronic fundamentals
- ▶ Module 5 – Digital techniques/electronic instrument systems
- ▶ Module 6 – Aircraft materials and hardware
- ▶ Module 7 – Maintenance practices
- ▶ Module 8 – Basic aerodynamics
- ▶ Module 9 – Human factors
- ▶ Module 10 – Aviation legislation
- ▶ Module 11 – Aeroplane aerodynamics structures and systems
- ▶ Module 15 – Gas turbine engines
- ▶ Module 17 – Propeller
- ▶ Module AA-02 – Aviation English (as required)
- ▶ Module AA15 – New supervisor

The training occurs in a hangar across from the terminal and adjacent to Qantas and Virgin Australia maintenance facilities.



Topic 5

In this topic you will learn how to:

5A Prepare for the session

5B Structure activities to optimise the benefit to the learner

5C Monitor the learner and change the approach if necessary

5D Behave ethically

5E Schedule regular meetings to monitor the effectiveness of the learning relationship

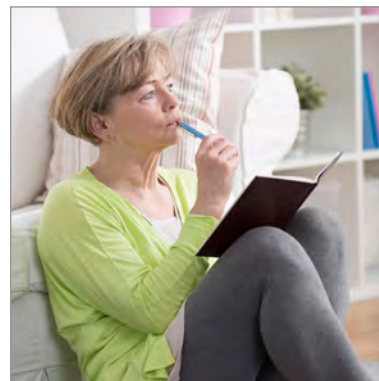
Maintain and develop the learning-facilitation relationship

The success of workplace training depends on the effectiveness of the trainer-learner relationship. A successful relationship encourages and facilitates self-learning and commitment to the training process. To be a successful workplace trainer, you need to:

- ▶ prepare thoroughly
- ▶ recognise when change and adjustment to suit the learner is required
- ▶ be aware of the obligations and constraints you must observe with the learner's employer
- ▶ demonstrate appropriate behaviour and conduct during training delivery.

5A Prepare for the session

Training sessions involve interaction between the learner and the trainer, and the transfer of skills and knowledge. Preparing for the delivery of each session is a vital phase of the workplace training process. Consider and prepare for the session to ensure that the content and the delivery location are organised in advance.



Content-based considerations

To prepare for each session you will need to organise a number of important documents.

Documents that may be required for a training session include:

- ▶ the session plan, which may sometimes be referred to as a lesson plan or training plan (however, this is a different document to the one used in the contract phase of work-based learning)
- ▶ course learning materials that are required by the learner, such as assessment workbooks, learner guides, textbooks and portfolios
- ▶ Australian apprenticeships' workplace diaries/logbooks; it is mandatory for apprentices and trainees to have a logbook
- ▶ slides, notes, handouts, samples, posters or any other learning aid applicable to the training session.

Create a session plan for workplace learning

Session plan formats differ across organisations, but the basic purpose is the same: a session plan is used to guide the trainer through the course content for any given session. It outlines timing, resources needed and content to be covered. Some session plans include location and evidence requirements, times allocated for ice-breakers, roll-call and assessments, depending on the learning context. Here is an example of a session plan. Ask your trainer for a template sample 'Session plan'; Aspire has included relevant templates in its *Trainer's and assessor's guide* for this unit.

Session plan	
Learning program	Certificate III in Warehousing Operations
Session name	TLID2010 Operate a forklift Session 1 of 3
Aim	Learners will develop skills and knowledge to check and operate a forklift under supervision.

Example

Prepare for the session

Jill has to deliver a six-hour training session on account reconciliation and cashflow estimations to a group of corporate executives. The Diploma-level subjects are relatively complex with respect to the amount of content to be delivered in such a short time. Jill determines the workplace requirements and the assessment requirements of the unit of competency, but needs to do more in order to prepare thoroughly.

1

Determine assessment requirements

Jill contacts the workplace manager. She learns there is no assessment required. This will allow her more time to deliver the content and have the learners practise the tasks in the workplace. She will not address performance criteria from the units of competency that do not apply to the workplace or the client's needs.

2

Secure resources

When speaking with the manager, Jill secures the use of the boardroom, whiteboard and data projector facilities. She also arranges for learners to work from the administration and accounting area office for the workplace requirements of the unit.

3

Prepare session plan

Jill carefully reads through the units of competency and designs a sequence that uses the elements and performance criteria to piece together what she will be delivering. She estimates the time to deliver each element and skips those that don't apply to the client. She allocates time for the learners to be in the workplace office.

4

Visualise training session

Jill then visualises her training session. She goes through it in her head to determine what activities to do and when to ensure she will be able to deliver and have learners practise the tasks in the given time. She considers which activities the learners will do on their own under the supervision of a supervisor in the workplace.

5

Prepare workbooks

Jill then prepares 10-page workbooks for the group so they can follow along with the content and complete exercises as they go. She adapts existing workbooks she owns the copyright for by removing irrelevant content and re-formatting the remaining text.

6

Trial session

Jill trials the session to make sure the timing is sufficient and the activities are manageable.

7

Confirm training

Jill confirms the training with the workplace manager to ensure that needs are sufficiently covered. She then incorporates his feedback before the training session. She confirms the arrangements with the workplace office that the learners will use as part of their training.

8

Gather resources

Before attending the session, Jill prepares a folder with all her examples, workbooks and a USB stick with her visual presentation on it.



Topic 6

In this topic you will learn how to:

- 6A Use skills to close the relationship smoothly**
- 6B Seek learner feedback on outcomes and the relationship**
- 6C Evaluate the effectiveness of the work-based learning pathway**
- 6D Recommend improvements after the review process**

Close and evaluate the learning-facilitation relationship

The learner-trainer relationship concludes when there is enough evidence gathered to support the goals and outcomes of the training. The assessment outcome then legitimises the attainment of the goals. During this process and especially for training relationships that have been going on for some time, there can be a sense of melancholy or sorrow at the impending completion. Managing the end stage of training delivery can play an important part in encouraging the learner to continue to progress to future success, and helps to ensure a positive training experience.

6A Use skills to close the relationship smoothly

Australian apprenticeships can last from three months (for some trainees) and up to five years or more for some trade apprentices. During this time, the relationship between the trainer and the learner often becomes bound by common goals, workplace experiences, personal growth and successfully completing a large learning commitment. To close the relationship effectively requires a high level of interpersonal and communication skills, and an eye for detail to ensure that all matters are finalised properly at the end of the training period.



Steps to close the relationship

While the level of the relationship will vary in different contexts, a consistent approach to closing each learning relationship will be beneficial. By forming a routine, your professional practice will improve over time and you will be able to guide learners through the process more efficiently.

The following process includes policy and procedure requirements for most workplace training situations.

Pre-empt the ending of training	In the weeks or days prior to the close of training, discuss the final steps with the learner and encourage them to view the end of their training experience as a positive. By approaching the conclusion with a positive attitude, the learner is likely to remain more attentive during the last period of training and to embrace the final stage as an exciting step in their career.
Prepare contracts and training documentation	Ensure you have completed copies of the Australian apprentice's training log. For traineeships and apprenticeships, this document serves as vital evidence to attain the qualification, and must be completed by gaining the signatures of the learner, supervisor and trainer for all units and/or activities undertaken during the training. In NSW, apprentices and trainees can choose to record their activities on an app designed for the purpose.
Meet with the learner and their supervisor to finalise the training	You need to meet with the learner and their supervisor in all cases, whether or not contracts for government funding are in place. Use the meeting to discuss the training, gain formal and informal feedback and collect all the remaining paperwork, including: <ul style="list-style-type: none"> ▶ the completed training log ▶ the signed completion contract (if applicable) ▶ any outstanding supporting evidence for assessment that the learner still needs to submit.
Finalise the documentation	Prepare and gather the completed legal documentation for the learning period. Include contracts, feedback tools and the learner's logbook.