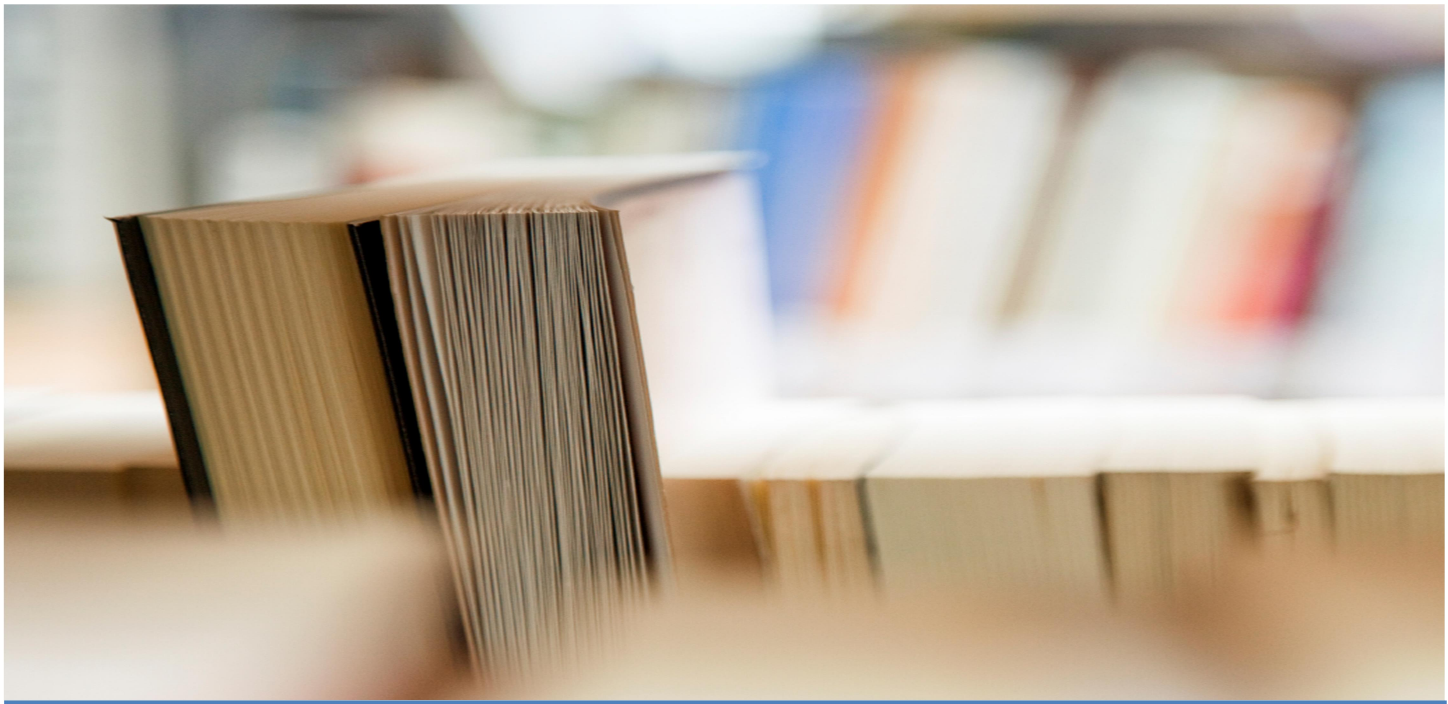


# Participant Handout

## Platform Skills - Training of Master Trainers Program

**TOT Program organized by**

**Food Industry Capacity and Skill Initiative**

**In Association With**

**E3 Consultancy and Services**

# CONTENT

# Introduction

## Introduction

**SECTOR/S:** Management, Entrepreneurship & Professional Skills
**SUB-SECTOR:** Training and Assessment
**OCCUPATION:** Training Delivery
**QP Name & Code: Trainer(**MEP/Q2602)

**Brief Job Description:** The master trainer conducts trainer development as well as sessions that require advanced facilitation skills. They have a key role in assuring the quality of end to end training services and providing recommendations for continuous improvement of training effectiveness. They customize training programs as per the specific needs of the target audience and to enhance effectiveness.

**Personal Attributes:** The individual must have expertise in the technical/vocational domain of instruction. They must have strong communication, organizational and interpersonal skills. They must be quality focused, well organized and encourage learner engagement. Additionally, they should remain abreast with the latest
trends in their domain and upgrade their facilitation skills.

**APPLICABLE NATIONAL OCCUPATIONAL STANDARD (NOS)**

| S.No | QP Code |
|---|---|
| 1 | MEP/N2605: Evaluate trainers and training programs and provide recommendations for improving training effectiveness |
| 2 | MEP/N2606: Plan and facilitate trainer development |
| 3 | MEP/N2607: Conduct trainings that require advanced facilitation skills |
| 4 | MEP/N2608: Customize training program as per special requirements of learners and local environment |
| 5 | MEP/N2609: Identify new programs for training |
| 6 | MEP/N9911: Apply health and safety practices applicable in a training and assessmentenvironment |
| 7 | MEP/N9912: Apply principles of professional practice at the workplace |

**Commonly used Terminology:**

1.**Sector** is a conglomeration of different business operations having similar business and interests. It may also be defined as a distinct subset of the economy whose components share similar characteristics and interests.

2**. Sub-sector** is derived from a further breakdown based on the characteristics and interests of its components.

3. **Occupation** is a set of job roles, which perform similar/ related set of functions in an industry.

4**. Occupational Standards(OS)** specify the standards of performance an individual must achieve when carrying out a function in the workplace, together with the knowledge and understanding they need to meet that standard consistently. Occupational Standards are applicable both in the Indian and global contexts.

6. **Qualifications Pack (QP):** QP comprises the set of OS, together with the educational, training and other criteria required to perform a job role. A QP is assigned a unique qualifications pack code.

## PROGRAM OBJECTIVES

At the completion of this program, the participants will be able to:

- Elucidate on the job role
- Evaluate learning environment, delivery requirements and modify session plans
- Facilitate training session in a suitable environment
- Delivering competency based, instructor led sessions as per session plan
- Demonstrate formative and summative assessment
- Organize and impart training of work skills on-the-job environment
- Evaluate health and safety practices
- Demonstrate a disciplined and ethical behavior

# MODULE I: FUNDAMENTALS OF TRAINING

**Learning Objectives of the Module**

**At the end of this module, the trainee will be able to:**

- ❖ Explain the importance of training and development for individuals, organisations and society.
- ❖ Describe the concept of competency.

## 1. What Is Training?

- Training is an organized activity aimed at imparting information and/or instructions to improve the recipient's performance or to help him or her attain a required level of knowledge or skill.

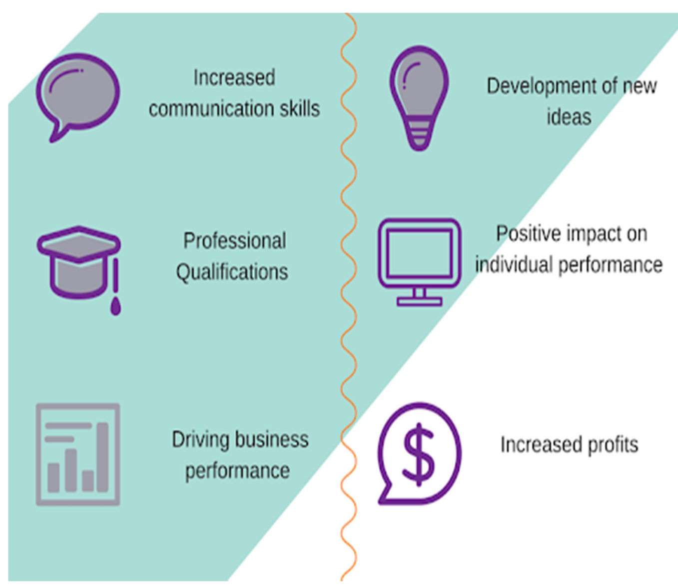
- Training is about developing people as individuals and helping them to become more confident and competent in their lives and their jobs.

## 2. Purpose of Training

- To create a change
- To make certain behaviors automatic
- To enable the trainee/learner to apply as is to real-world situations
- To enable learners to produce learned behavior with fewer errors, greater speed and under more demanding conditions.
- To focus ONLY on what is the performance outcome desired


## 3. Benefits of Training

- Increased job satisfaction and morale among employees
- Increased employee motivation and hence reduced employee turnover
- Increased efficiencies in processes, resulting in financial gain
- Increased capacity to adopt new technologies and methods
- Increased innovation in strategies and products
- Enhanced company image, e.g., conducting ethics training
- Risk management, e.g., training about sexual harassment, diversity training



## 4. Defining Competency

**Competency** describes a cluster of related **knowledge, skills** and **attitudes** that are **observable and measurable**, necessary to perform a work activity independently at a prescribed proficiency level.

- Individual characteristics of a person which result in an effective and superior performance in a job

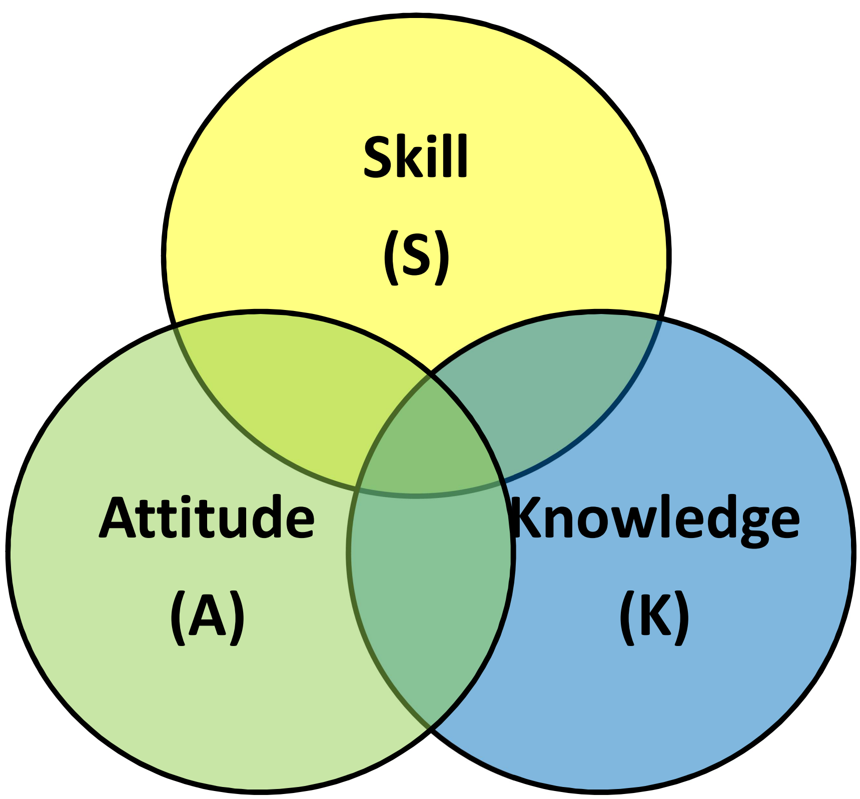
### The idea behind competencies

Every job has a requirement of specific set of competencies to undertake it efficiently, and the individuals who would perform the job need to be laced with those competencies. One of the interesting and worth mentioning aspect of this term is that it focuses not only on what a person can do but also on what a person can learn. This forward looking approach makes it quite popular amongst training providers and recruitment experts.

Competencies with their specific behavioral indicators facilitate the demonstration of appropriate skills and behaviors, it is not a set of tasks performed like a robot neither it is an underlying capacity which is never demonstrated.

Competency also includes motivation and self-knowledge, a desire and willingness to demonstrate effective performance

## 5. Components of competency



## 6. Competency Based Training

- Given sufficient time and appropriate training, learners can master the required knowledge and skills for the jobs.
- How well the person can do after mastering the learning.

# MODULE II: PROFESSIONAL CONDUCT OF TRAINERS

**Learning Objectives of the Module**

**At the end of this module, the trainee will be able to:**

- ❖ Explain the importance of training and development for individuals, organisations and society.
- ❖ Describe the overall training and development functions in an organisation.
- ❖ Describe the role and responsibilities of a trainer.
- ❖ Display appropriate professional appearance for the workplace.
- ❖ Demonstrate appropriate professional appearance and behaviour at the workplace.
- ❖ Complete duties accurately and systematically in accordance to organisational guidelines/policies within the required timeframe.

## 1. Duties of a Trainer in Skill Development

- Organization's quality assurance, policies and procedures such as:
  - ❖ Enrolment and induction/orientation,
  - ❖ Complaints, grievances and appeals,
  - ❖ Assessment, including skills recognition, pre- assessment and appeals,
  - ❖ Training support requirements, for example, language, literacy, numeracy and disability needs
  - ❖ Issuance of qualifications,
  - ❖ Risk management,
  - ❖ Continuous improvement,
  - ❖ Health Safety and Environment,
  - ❖ Staff disciplinary procedures,
  - ❖ Financial and records management,
  - ❖ Management processes for learning resources and learning materials etc.
- Maintaining learning records according to organizational policy and procedure
- Manage work and work relationships and work effectively in the workplace
- Effectively use established communication systems and protocols in the workplace
- Plan and undertake work collaboratively
- Protect the rights of the client/leaner when delivering services
  - ❖ Client –
    - ▪ Client information
    - ▪ Internal challenges faced and shared by the client.
    - ▪ Employee information.
    - ▪ Results informed/ shared by employees as a result of application of the learning.
  - ❖ Learner –
    - ▪ Evaluation data (Restricted to HR, if applicable)

- Information shared by learner on personal basis
- Personal and professional challenges shared by learner in a personal conversation

- Recognize potential ethical issues in the workplace and discuss with an appropriate person.
- Determine professional development needs and prepare development plan
- Organize and check training facilities and aids
- Conduct training session
- Undertake formative assessment
- Collect and review learner feedback
- Undertake post- training activities
- Identify support needs of learners
- Provide support to learners to meet identified needs, within scope of role
- Support individual participants with additional needs in the training session
- Provide coaching and motivation

**2. Skills in a successful skill development Trainer**

To be a successful skill development trainer, one needs a combination of both core/generic skills and professional skills.

- **Core/generic Skills:** Core skills are those that apply across a variety of jobs and life contexts such as writing skills, reading skills, communication skills, technology skills etc. They are also known by several other names, including key skills, essential skills, key competencies, necessary skills, transferable skills and employability skills.

- **Professional Skills:** Professional skills are career competencies that often are not taught (or acquired) as part of the coursework as Decision Making, Planning and Organizing, Customer Centricity, Problem Solving, Analytical Thinking, Critical Thinking, and are value-added skills essential to any career.

**3. Trainer Ethics**

- Practice upholding the rights of the client
- Practices of confidentiality
- Reporting suspected unethical conduct
- Demonstrating probity in all areas of responsibility
- Modeling organizational/professional codes of conduct
- Reinforcing ethical conduct in interactions with others
- Showing sensitivity and respect for individual diversity and culture
- Recognizing and utilizing difference to develop individuals
- Fostering a culture of inclusiveness

## 4. Qualities Of a Superb Trainer

- Focused on performance improvement
- Ability to relate to different cultures and situations
- A willingness to learn
- Ability to create a safe learning environment
- Ability to motivate
- Willingness to use a variety of styles
- Willingness to shift focus as needs change

## 5. Trainer Appearance/ Dress Code

- Formal clothes (formal shirt, pant/trouser with leather belt)
- Neatly combed hair
- Shave, trim your moustache and beards regularly
- Clean finger nails
- Clean formal shoes with socks matching the color of trouser
- No paan  stained teeth
- No body odour
- No loud makeup and strong perfume


## 6. How to Have a Successful Training Program?

- Be Concise
- Be Focused
- Keep Schedule
- Use Experts
- Use Visuals
- Encourage Questions

## 7. Professional Conduct During Online Session

- Be Very Well Prepared
- Keep the Schedule
- Wear The Proper Attire
- Avoid Fidgeting And Sudden Movements
- Be Attentive
- Eliminate Noise

# MODULE III: PRINCIPLES OF ADULT LEARNING

**Learning Objectives of the Module**

**At the end of this module, the trainee will be able to:**

- ❖ Explain the assumptions about adult learners.
- ❖ Describe the characteristics of adult learners.
- ❖ Describe the three domains of learning objectives i.e. psychomotor, cognitive and affective in relation to learning and assessment.
- ❖ Distinguish between learner-centered training and trainer-centered training.
- ❖ Identify the features of a conducive environment for learning.

## The Adult Learning Theory - Andragogy

**Malcolm Shepherd Knowles** (1913 – 1997) was an American educator well known for the use of the term **Andragogy** as synonymous to **adult education**. According to Malcolm Knowles, **andragogy** is the art and science of adult learning, thus andragogy refers to any form of **adult learning**. (Kearsley, 2010).

The term **andragogy** can be supposedly equivalent to the term pedagogy. Andragogy in Greek means man-leading in comparison to pedagogy, which in Greek means child-leading.

## Knowles' 5 Assumptions of Adult Learners

In 1980, **Knowles** made 4 **assumptions** about the **characteristics of** adult Learners (**andragogy**) that is different from the assumptions about child learners (pedagogy). In 1984, **Knowles** added the 5th assumption.

### 1. Self-Concept

As a person matures his/her self-concept moves from one of being a dependent personality toward one of being a self-directed human being.

### 2. Adult Learner Experience

As a person matures he/she accumulates a growing reservoir of experience that becomes an increasing resource for learning.

### 3. Readiness to Learn

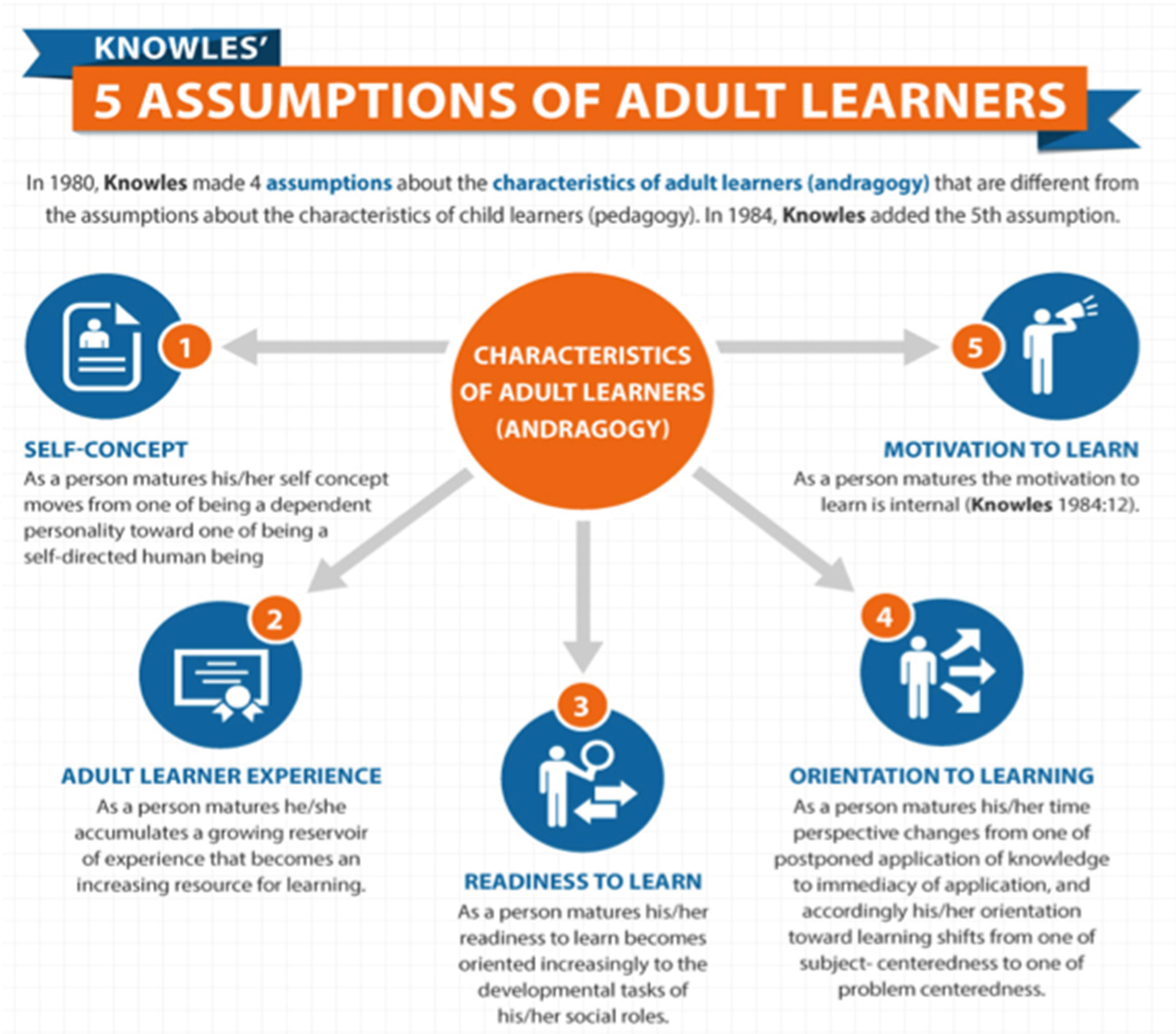
As a person matures his/her readiness to learn becomes oriented increasingly to the developmental tasks of his/her social roles.

### 4. Orientation to Learning

As a person matures his/her time perspective changes from one of postponed application of knowledge to immediacy of application. As a result his/her orientation toward learning shifts from one of subject- centeredness to one of problem centeredness.

### 5. Motivation to Learn

As a person matures the motivation to learn is internal (**Knowles** 1984:12).




**Adult Learning Principles**

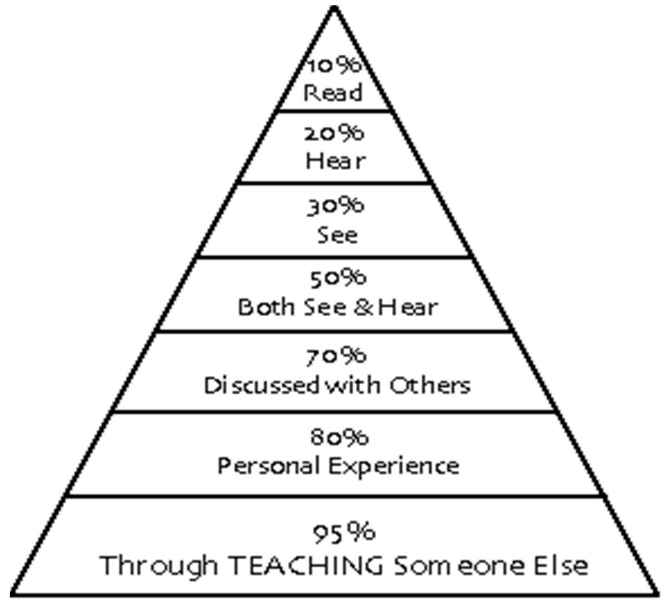
Adult learning principles are:-

- Training needs to be learner-centered to engage learners
- Adults have a need to be self-directing and decide for themselves what they want to learn
- Adults have a range of life experience, so connecting learning to experience is meaningful
- Adults have a need to know why they are learning something
- The learning process needs to support increasing learner independence
- Emphasis on experimental and participative learning
- The learning process should reflect individual circumstances

**Cone of Learning- Role of Senses in Learning**

Of what we learn, we retain approximately:

- 10% of what we read
- 20% of what we hear
- 30% of what we see
- 50% of what we hear and see
- 70% of what we say – discussed with others
- 90%-95% of what we say and do The greater the combination of our senses that are stimulated in learning, the more successful learning is likely to be




**Different Learning Styles (Learners) and their handling strategies**

1. **Visual Learners:**
    - They learn by seeing and visualizing.
    - They tend to be fast talkers.
    - They exhibit impatience and have a tendency to interrupt.
    - They use words and phrases that evoke image.

    **Dealing Strategy**
    The use of demonstration and visually pleasing material and efforts should be made to paint mental pictures.

2. **Kinesthetic Learners**
    - They learn by doing and solving real-life problems.
    - They like hands-on approaches to things and learn through trial and error.
    - They use all their senses to engage in learning.
    - They tend to be slowest talkers of all.

    **Dealing Strategy**
    Use hands-on demonstrations and case examples to be discussed and solved. The training strategy should be learning by doing.

3. **Auditory Learners**
    - They learn by listening and verbalizing.
    - They prefer to have things explained to them verbally.

- They like to think in a linear manner.

**Dealing Strategy**
Sound good, clear and the training should be planned and delivered in form of an organized conversation.

4. **Read- Write Learners**
   - They enjoy reading and writing in all forms.
   - They emphasize text-based input and output.
   - They prefer for information to be displayed in writing such as list of ideas

**Dealing Strategy**
Writing out key words in list form. Learners will learn by reading or rewriting the notes repeatedly; writing ideas in their own words. Organizing any diagrams, graphs, other visual depictions into statements ( eg. "The trend is…") and putting reactions, diagrams, etc. into words.

**Application of Adult Learning Principles in Online Training**

Adult learning principles can be applied during the design of online courses, assignments and learning activities.

During online training activities or assignments that don't appear to have a purpose, don't require critical analysis, don't appear to align with course learning objectives, or don't have real world application can lead to dissatisfaction in the mind of the learner as their need is not fulfilled or their time is not valued.

During an online training session it is beneficial to explain the purpose of an assignment, to describe how it will further learning and be of value, or be applicable later in the course.

## MODULE IV: TRAINING PROCESS

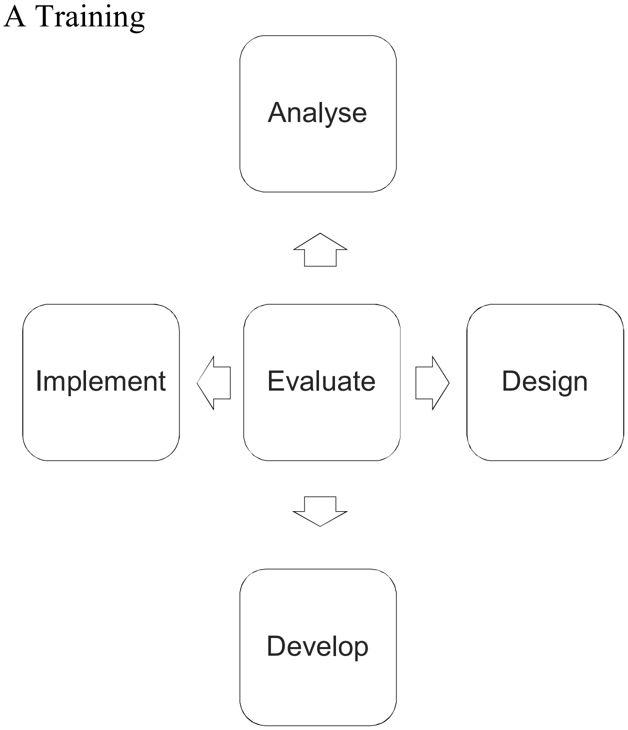
**Learning Objectives of the Module**

**At the end of this module, the trainee will be able to:**

- Describe the key features of a training organization.
- Describe the main stages of the training cycle.
- Explain the objectives and learning outcomes of the training program.
- Describe the use of session delivery plans and facilitation guides for the implementation of a training program.
- Explain the process of evaluating the effectiveness of the training program.

### Training Process

A = Analysis of Training Needs
D = Design of Training
D = Development of Training Materials
I = Implementation in A Classroom
E = Evaluation of A Training




### Analyze Phase

In this phase, we clarify the current situation and the desired outcomes from the program. At the end of this phase we should know changes desired as a result of training program.

**Some sample questions that can be asked during this phase are:**

- Who are the participants?
- What is the expected level of knowledge, skills and attitude?
- What is the current level of knowledge, skills and attitude? Why is it important for this gap to be bridged?
- What tools can we use to measure knowledge, skills and attitude:
    - Written assessments
    - Psychometric assessments
    - Knowledge based interview
    - Task based skill assessment
    - Peer feedback
    - Role-plays

- What are the current changes that the industry/organization is going through? How can training prepare the participants better for it?
- What are some of the constraints/ challenges we can foresee?

We can use 5 W's and an H to answer some critical questions in analysis phase:

- Why is there a need for training?
- Who is the participant?
- What areas need to be addressed? (Knowledge, Skills, Habits, Attitude, Up skilling)
- How can we accomplish this?
- When will it happen? (Time and duration)
- Where will it take place? (Geographical area, other considerations)

**Note:-** For e-learning, app- based and blended learning during the analysis phase following points should be taken care of:-

- If the trainer and participants has initial skills related to the online learning;
- If the trainer has prior experience and educational resources (content, activities, assessments, etc.) consistent with online learning usage
- If the training center, trainer and participants (for online learning) has a high-quality technological infrastructure (IT and telecommunications) necessary to manage the online learning (participant equipment, public Wi-Fi access, etc)
- If the training team has clearly defined the objectives to be achieved, planned the actions to be carried out and identified the resources to be mobilized;
- If the project team has specified the roles and attributions of each of the members involved in supporting the online learning.

**Design Phase**

In this phase, we make practical decisions about how to utilize the knowledge acquired from the previous phase to formulate delivery strategy.

**Some sample questions that can be asked during this phase are:**

- What are the key objectives for the program?
- What are the various delivery methods and duration?

- What are the key concepts/modules that need to be delivered?
- Can we have a prototype for the program? How can we test it before developing the entire program?
- What tools can be used to supplement classroom learning:
    - Assessments
    - On-the-job training
    - On field demonstrations
    - On-field observation with feedback

**Note:-** For e-learning, app- based and blended learning during the design phase following points needs attention:

1. While designing online learning solutions for adults, one must consider:-
   :
    - Motivate the learners.
    - Provide a sense of control.
    - Outline clear learning objectives.
    - Keep the information relevant and contextual.
    - Present the content using a problem-solving approach.
    - Use engaging methodologies to present the content.
    - Allow the learners to practice through assessments, quizzes, tests and so on.
    - Provide descriptive analogies, visual aids and mind maps to enable retention of learning.
    - Distinguish between 'nice-to-know' and 'must-know' information.

2. While designing online learning solutions for adults, one must avoid:
    - Long course duration
    - Condescending and preachy tone
    - Unnecessary and ambiguous information
    - Distracting the learner from the objectives
    - Big paragraphs or chunks of information

**Develop Phase**

This is where we create learning material based on the output from design phase. Since the core of the content has already been decided in the design phase, this phase calls for focus on content details and delivery. We also chose the methodology for delivering the content with a detailed lesson plan in this stage.

**Some sample questions that can be asked during this phase are:**

- What are the different tools/models that can be used to achieve module and program outcomes?
- What is the best way to present the key concepts/tools?
- How will the concepts apply to a specific participant type or industry?

- What methodology can we use to deliver these concepts?

    - Lecture Method
    - Case Studies
    - Quiz
    - Activities and Group Tasks
    - Questionnaires

- How can we test the material? Can there be a pilot test?
- Which stakeholders can we involve to seek inputs at this stage?

**Note:-** For e-learning, app- based and blended learning during the developing phase the content can vary considerably, depending on the available resources. For example, e-learning content may consist of only simpler materials (i.e. those with little or no interactivity or multimedia, such as structured PDF documents) which can be combined with other materials (e.g. audio or video files), assignments and tests. In that situation, storyboard development and the development of media and electronic interactions would not be conducted.

The development of multimedia interactive content is comprised of three main steps:

- **Content development:** writing or collecting all the required knowledge and information;
- **Storyboard development:** integrating instructional methods (all the pedagogical elements needed to support the learning process) and media elements. This is done by developing the storyboard, a document that describes all the components of the final interactive products, including images, text, interactions, assessment tests; and
- **Courseware development:** developing media and interactive components, producing the course in different formats for CD-Rom and Web delivery and integrating the content elements into a learning platform that learners can access.

**Implement Phase**

This is the phase where all the participants get to experience the program and is the 'moment of truth' for most programs. In this phase the trainer needs to demonstrate the ability to be structured and flexible at the same time.

**Some of the areas that the trainer needs to focus on during this phase are:**

- Facilitation
- Participation by trainees
- Share constructive and motivational feedback
- Engage with activities
- Check for understanding

**Note:-** For e-learning, app- based and blended learning during the implementation phase the courseware is installed on a server and made accessible for learners. In facilitated and instructor-led courses, this stage also includes managing and facilitating learners' activities.

**Evaluate Phase**

In order to understand the efficacy of any process, measurement and evaluation plays an integral part and training is no different. It is important for the content team as well as the trainer to have a clear understanding of what needs to be evaluated and which tools do we need to leverage.

**Some sample questions that can be asked during this phase are:**

- How will we measure participants' reaction to the program? Which factors do we need to evaluate? o How can we assess the knowledge level of participants after the training? Do we want to compare the final scores with the pre training scores or with a defined score to clear the assessment?
- How can we measure if the participant is applying the learning at workplace?
- How can we measure the improvement in productivity or cost reduction?

Since we might not be able to evaluate all the parameters, it is important to have a clear understanding of what needs to be evaluated in the initial phases.

**Note:-** For e-learning, app- based and blended learning during the evaluation phase various onlne methods are used pre, post and during the program.

# MODULE V: CONDUCTING A TRAINING NEEDS ANALYSIS

**Learning Objectives of the Module**

**At the end of this module, the trainee will be able to:**

- ❖ Understand Training Need Analysis
- ❖ Identify different steps of Training Need Analysis
- ❖ Identify various components under steps of Training Need Analysis
- ❖ Understand various competencies that are required to be developed for effective Training Need Analysis

## 1. What is Training Need Analysis?

- A training needs analysis is a systematic approach for determining what training needs to take place.
- A training needs analysis ensures training is targeting the correct competencies, the correct employees and is addressing a business need.

## 2. 7 steps of Training Need Analysis

- ➢ **Step 1: Determine Desired Outcomes**
  - o Clarify goal of the training and expected business outcomes
  - o Training goal should correspond to a business objective

- ➢ **Step 2: Link Desired Outcomes with Employee Behavior**
  - o Identify the competencies (behaviors, skills, qualities and knowledge) that are linked to desired outcome.
  - o Collect information and data from subject matter experts to determine which competencies are critical to achieving the outcomes.
  - o What skills does one need to achieve this goal?
  - o What information is necessary to meet this objective?
  - o Which behavior is critical to completing this task?

- ➢ **Step 3: Identify Trainable Competencies**
  - o Evaluate the critical competencies and determine if they are: Abilities one should possess prior to job entry or Abilities that can be leaned on the job.

- ➢ **Step 4: Evaluate Competencies and Determine Performance Gaps**
  - o Evaluate current competencies and identify where there are gaps between current ability and desired ability.
  - o To evaluate current competency level use: Performance evaluations, Tests, Surveys, Self assessments, Interviews, Customer feedback**.**

- ➢ **Step 5: Prioritize Training Needs**
  - o Identify the percentage of employees who need training on the competencies.
  - o Consider the importance of the competencies to the business objectives.

- Together, the need and the importance will allow you to identify training priorities.

➢ **Step 6: Determine How to Conduct Training**

- Consider adult learning theory and best practices in training on the particular competencies.
-
- Training methods can range from: On the job training (OJT), Mentoring and coaching; Classroom / lecture, Web-based / e-learning, Reading / books, Conferences, Academic programs

➢ **Step 7: Conduct a Cost Benefit Analysis**

- Consider the costs associated with the training methods, the extent to which the training will address the performance gap, and the impact on business.
- Cost factors include: Training time, Content development time (if designed in-house), Training provider evaluation (if purchased from vendor), Training content delivery method, Lost productivity from time spent in training, Travel and logistical expenses.

| FACTOR TO BE CONSIDERED | WHY IS IT IMPORTANT? |
| --- | --- |
| Region or geographic area in which learners reside. | This is needed to define language and cultural issues and to inform choices between synchronous and asynchronous tools (learners located in different time zones will have difficulty communicating in real time). |
| Kind of organization or institution in which learners work and their professional role(s) within them. | This will help to identify specific learning objectives for each target audience group. |
| Learners' previous knowledge and expertise on the subject. | In general, learners with a lot of prior knowledge do not need the same kind or level of training support as novices. |
| Learners' computer skills and technical expertise. | This will help to define the complexity of the computer-based interactive activities. |
| The amount of time available for e-learning and the learning context . | This information influences the amount of content to be provided and the need for chunking the content into small units. |
| The location where learners will participate in e-learning and from where they can access the Internet; can they study at home, at work or in e-learning centres? | This determines how much connection time is required for the course and whether learners can download plug-ins from the Internet. |
| Network bandwidth. | Bandwidth limitations may slow application performance and decrease user productivity. In certain situations, low bandwidth applications may be preferred since they take less time to transmit. |
| Computer and software capabilities, such as screen size, number of colours they can display, sound playback, RAM (amount of memory), processor type and speed . | Technical requirements, including multimedia capabilities, influence the selection of the media mix and plug-ins. |

# MODULE VI: DESIGNING A TRAINING PROGRAM

**Learning Objectives of the Module**

**At the end of this module, the trainee will be able to:**

- Understand basic elements of an effective training design
- Learn various Steps in Designing a Training Program
- Learn how to make Course Outline or Course Map

The design phase deals with learning objectives, assessment instruments, exercises, content, subject matter analysis, lesson planning, and media selection.

- **The basic elements of an effective training design are**: –
  - It is learner-focused
  - It should be based on identified needs
  - It has measurable objectives
  - It is goal oriented
  - It is time bound
  - It has taken into account the resource constraints and availability.

- **5 Steps in Designing a Training Program**

- Identify your training goals and target audience
- Know your learning objectives
- Prepare your course outline or map
- Prepare an in-depth session flow.
- Research and design training methods/resources/activities

- **Target audience**
  - Who needs the training in the Organization?
  - What attitudes will the trainees likely hold towards the training?
  - What knowledge, skills and abilities do the trainees already possess?
  - What specific knowledge, skills and abilities would you want the trainees to obtain?

- **Learning Objectives**

  A learning objective is a statement that tells what learners should be able to do after they have completed a segment of instruction.

  Learning objectives serve as the basis for the design of the whole instructional plan, including determining appropriate training content, methodology, resources needed. They are used in assessing training outcomes and they are used to facilitate active learning.

  Learning objective:
  - Identify when the knowledge or skill is to be demonstrated
  - Identify who is going to be able to demonstrate the KSA
  - Provide a description of the expected performance
  - Describe how well the performance must be demonstrated

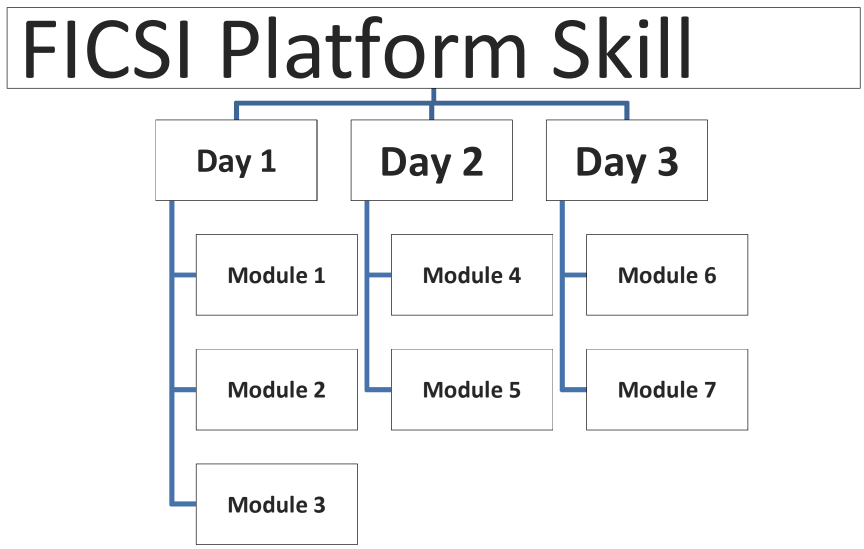
➢ **Caselet:** Write the learning objectives for the proposed training per the TNA conducted in previous chapter.

❖ **What is a Course Outline or Course Map?**

Having completed the training analysis and having written the objectives, we now have to have a good idea of what is going to be included in the training. The next step is to outline the information you plan to present and develop the course map.

A course map lists in hierarchical order the modules within the units**.**

Course Map Example




➢ **Case let:** Prepare the course map for the proposed training per the TNA conducted in previous chapter.

When designing the content for e-learning, app- based and blended learning, one must keep following points in mind w.r.t the content :

- **Learner-centred content**
  eLearning curriculum should be relevant and specific to learner's needs, roles and responsibilities in professional life. This kind of content like skills, knowledge and all kind of learning media provided to keep the focus on learner's end.
- **Engaging content.**
  Instructional methods and techniques should be used creatively to develop an engaging and motivating learning experience. It depends upon developing the storyboard that has to be based on a very engaging way of learning programs.
- **Interactive content.**

Frequent learner interaction is needed to sustain attention and promote learning. Scenario based learning is a good example for this kind of learning media.

- **Personalization.**
  Self-paced courses should be customizable to reflect learner's interests and needs; in instructor-led courses, tutors and facilitators should be able to follow the learners' progress and performance individually.

Based on the schedule a training design of an e-learning, app- based and blended learning course will involve using a combination of the following instructional methods:

- **Synchronous Methods**
- **Asynchronous Methods**

Based on the learning objective a training design of an e-learning, app- based and blended learning course will involve using a combination of the following instructional methods:

- **Expositive methods**
- **Application methods**
- **Collaborative methods**

# MODULE VII: PREPARING A SESSION PLAN

**Learning Objectives of the Module**

**At the end of this module, the trainee will be able to:**

- Identify effective training methods.
- Demonstrate various types of group introduction activities.
- Identify differences between instructor-led training and learner-led training.
- Demonstrate various training methods such as lecture, group discussion & presentation, group activities, role-plays, demonstration and practice, field trips, case studies, self-study.
- Demonstrate various training processes such as connecting to previous learning, delivering information in a step by step fashion, explanation with examples, two-way interactions, step by step demonstration, guide learner practice and recap/consolidation to optimise learner experience.
- Select the appropriate training delivery method and learning material according to adult learning needs.
- Identify various measures that can be taken to ensure the training environment is conducive to learning.
- Identify various technology tools for learning
- Explain the importance of monitoring participants closely while they perform the training activities.
- Demonstrate how to plan an appropriate training debrief.
- Demonstrate how to provide constructive feedback to individuals and groups

### What Is a Training Session Plan?

A training session plan – also called a learning plan/ training delivery plan – is an organized description of the activities and resources you'll use to guide a group toward a specific learning objective.

It details the subject matter that you'll teach, how long each section should take, the methods of instruction for each topic covered, and the measures you'll use to check that people have learned what you needed them to learn.

It can be as simple as a brief outline, or more complex, with scripts, prompts, and lists of questions that you plan to ask.

Most session plans share 4 common elements

- Objectives for that particular lesson
- Important areas of information to be covered
- Method of training to be used
- Materials or training aids to be used in that lesson

### Why Use a Training Session Plan?

It takes time to plan a good training session. However, you and your trainees will benefit from this preparation.

As you plan, you visualize each step of the class. This helps you ensure that you've thought about everything that you need to say, and that you present information in a logical order. You'll also be able to prepare for points that people might find difficult to understand.

After your session, you can use your plan to work out what went well – and what didn't – so that you can adapt it for future lessons.

Last, a training session plan will be invaluable for a substitute instructor, if you can't make it to class.

**How to Develop a Session Plan**

To develop a session plan, it's useful to use a standard training plan template. This helps you organize material consistently over sessions, and avoid duplicating topics.

**Session Flow Example**

FICSI TTT Program

Day 1

Module 1: Fundamentals of Training

Time Topic 1 Objectives Methods

Materials Time Topic 2 Objectives Methods

Materials Time Topic 1 Objectives Methods

Materials

Note: For developing the session plan for e-learning, app- based and blended learning course the format is same as that for on-site/classroom training.

**Identify Training Methods/ Resources/Activities**

The training method is the vehicle for carrying your content to your participants. In broad terms, methods can either be passive/didactic for the participant such as readings, lectures, speeches or talks or they can be active/experiential such as games, role plays, simulations and case studies.
Passive methods are those in which the participants simply listen or watch some training activity.
Active methods are those in which the participants take part in or perform some part of the training activity.

When selecting a training method, answer the following questions:

- Is this method appropriate for the objectives?
- Are there sufficient trainers available to use this training method?
- Are there resources available to use this training method?
- What is the projected size of the group to be trained?
- Is a special classroom arrangement required?
- Is this method appropriate for group training, individualized training, or both?
- What times are available for training?
- What is the background of the participants?
- Will the methods selected stimulate interest and provide variety?

## ➢ Training Methods

- **Stories and Analogies:** Analogies and stories are one of the most powerful speech strategies available to a presenter. An analogy is saying something is like something else to make some sort of explanatory point. An analogy or story anchors a complex idea to a concept or idea that an audience already understands. When you use an analogy, you are using the audience's prior knowledge and understandings to explain your concept. This is a much deeper form of learning because it is anchored to something that was already in their brain. As a result, the retention of concepts explained with analogies can be much higher.
  Stories can be used to illustrate all sorts of themes and lessons, and most stories are extremely flexible.
- **Case Studies:** The case study is a method which provides descriptive situations which stimulate trainees to make decisions. The purpose of the case method is to make trainees apply what they know, develop new ideas to manage a situation or solve a problem. The focus is more on the approach the trainee uses rather than on the solution. As a training tool, the case study method can be used to develop decision-making skills, enhance team spirit, better communication and interpersonal skills and strengthen the analytical skills of trainees.
- **Activities:** Different activities can be used during training to increase motivation, team building, improve productivity, increased collaboration, encourage creativity, positive reinforcement, improved communication and various other purposes.
- **Role plays:** Role Play, allows a learner to assume the role or tasks of a job by practicing or simulating real working conditions. The objective of role playing is to learn, improve or develop upon the skills or competencies necessary for a specific position.
- **Quiz:** Quizzes encourage learners to recall information that they have learned and can help them to better retain this information in the future. These also benefit trainer by helping them assess what the trainees has learned and what still needs to be taught.
- **Self Assessments:** Self-assessment is the ability to examine oneself to find out how much progress one has made. It is a skill that helps individuals monitor their own work or abilities, find out what their weaknesses and strengths are, and self-diagnose relevant solutions. The purpose of self-assessment is to help the learner know the extent of his abilities and to improve upon them.
- **Simulations:** Simulation method of training is the creation of a true-to-life learning environment that mirrors real-life work and scenarios. Trainees can put real knowledge and skills into practice not just by reading books on theory or listening to lectures, but through physical, hands-on activity.
  This type of training is so effective as it takes into account several of the learning styles preferred by different learners. Not everyone learns visually, or through auditory materials, and simulation-based training also considers the needs of kinesthetic learners who flourish through practical exercises.
- **Presentation:** A presentation is a means of communication that can be adapted to various speaking situations, such as talking to a group, addressing a meeting or briefing a team**.** When used during training mostly audio visual aids are used to make training effective.
- **Group Discussions:** Group discussion is formed by combining two different words i.e. group and discussion. Here, group means a number of people or things that are put together considered as a unit whereas the word 'discuss' is derived

from the Latin ‘discutere’, which means to shake or strike. Thus ‘discussion’ refers to examine the topic thoroughly to reach a conclusion. Collectively, it is called Group discussion which means the exchange of ideas by learners on a specific subject or topic. The whole concept is to bring collectively a unit of learners on a common platform to share their ideas. Group discussion as a training method can help learners enhance critical thinking, improve learning, help learners to understand a topic or concept deeply which will stay for a long time in their minds, improve communication skills of the learners to become more confident in speaking up and asking questions and may improve interest of learners in training sessions.

- **Demonstration and practice:** Demonstration of work skills is one of the most important methods during the skill development training as it enhances the participation and understanding of the learner towards the topic.
  Demonstration involves showing by reason or proof, explaining or making clear by use of examples or experiments. Put more simply, demonstration means 'to clearly show'
- Field trips
- Self-study
- Videos
- Pictures
- Lecture

➢ **Support Requirement Checklis**t

- Reproductions (notebooks, CDs, etc.)
- Gifts/Prizes
- Laptop/Computer
- Evaluation Forms

## Training Methods for e-learning, app- based and blended learning

Based on the schedule a training design of an e-learning, app- based and blended learning course will involve using a combination of the following instructional methods:

- **Synchronous Methods**

  Synchronous learning is any type of learning that takes place in real-time, where a group of people are engaging in learning simultaneously. Although learning occurs at the same time, learners don't have to be there in-person, or even in the same location. Synchronous learning enables learners to ask questions and receive answers on-the-spot, while also collaborating freely with their co-learners.

  For employee training, synchronous learning is a popular choice. It's a method that lends itself well to learning about updated company policies or new software that's being rolled out. When done right, it's also useful for customer and partner training as it creates an invaluable feedback loop.

  Some examples of synchronous learning include:

  - Live webinars
  - Video conferencing
  - Virtual classrooms
  - Instant messaging

  **Pros of synchronous Learning:**

  - Because of the social nature of synchronous learning, learners can easily interact with instructors and other learners, making group activities possible.
  - Synchronous learning takes place in real-time, which means learners can get immediate feedback. Ideas and opinions can also be promptly shared with fellow learners.
  - Similarly, if your learners are having trouble with any of the course content, synchronous learning allows them to ask questions and get instantaneous answers.

  **Cons of synchronous Learning:**

  - Synchronous learners have to be online at a certain time, and therefore their learning has to adhere to a specific training schedule. Learners can't access content where and when they like. To accommodate your learners and offer more flexibility, you could provide a webinar recording of the training session through your LMS.
  - Due to the group dynamic of real-time synchronous learning, some learners may feel they're not receiving the individual attention they need. This is especially true if there's any part of the training they do not fully understand. To bypass this, try checking in on the progress of your learners by setting aside time during training for one-to-one or group Q&A sessions.
  - The effectiveness of how well your learners understand the course content depends more on the quality of the instructor than the learners themselves. To overcome this, ensure your instructors receive relevant training so they're fully prepared for their role. Requiring instructors to plan their sessions ahead of time will also ensure they'll deliver a great learning experience for your learners.

- **Asynchronous Methods**

Asynchronous methods are time-independent. Asynchronous learning is more learner-centered. It enables your learners to complete courses without the constraints of having to be in a certain place at a certain time. In essence, asynchronous learning doesn't hinder learners by place or time. Asynchronous learning happens on your schedule. While your course of study, instructor, or program will provide materials for reading, lectures for viewing, assignments for completing, and exams for evaluation, you can access and satisfy these requirements on your own schedule, so long as you meet the expected deadlines. A self-paced course is an example of Asynchronous Learning because online learning takes place at any time.

Although not taking place then and there, asynchronous learning still allows the opportunity for feedback. Learners are free to share thoughts and questions with instructors and fellow learners, though they may not receive an immediate response.

Some examples of asynchronous learning include:

- Online courses
- Email
- Blogs
- Pre-recorded video lessons or webinars
- Online forums and discussion boards

**Pros of asynchronous Learning:**

- Asynchronous learning offers lots of flexibility. Although there's usually a deadline in sight, asynchronous learners can progress at their own pace and access their course at any time they choose and from any place.
- It's a cost effective way to train learners that are based in varying locations. Asynchronous learning means your learners can engage in courses regardless of their time zone or location.
- With asynchronous learning, learners have significantly more time to reflect on the material they are learning, which means they are likely to understand it more thoroughly.
- Additionally, asynchronous learning lends itself better to a fast-growing business. If you've hundreds or thousands of learners to train across the world, you can get them up to speed without the need for face-to-face training.

**Cons of asynchronous Learning:**

- Although learners may have access to an instructor, contact through asynchronous learning may be limited. Answers to queries cannot be given instantly (for example, learners may need to wait for an answer to an email). This can be overcome by ensuring you choose an LMS that makes communication as easy as possible.
- The lack of interaction with instructors and fellow learners leaves some individuals feeling isolated. This could lead to a lack of motivation and engagement in courses. So, combat learner isolation by focusing on creating great course content.
- Asynchronous learning is learner-centered, so those taking courses in this way need self-discipline and focus to be successful in completing the required course work. Using tools like Gamification or a Forum helps to keep your learners engaged.

Based on the learning objective a training design of an e-learning, app- based and blended learning course will involve using a combination of the following instructional methods:

- **Expositive methods**
- **Application methods**
- **Collaborative methods**

**Expositive methods**

Expositive methods require learners to listen and read or observe. A instructor delivers knowledge on a given topic, which can be complemented by tests and exercises to evaluate learners' memorization and/or understanding of the content.

Expositive methods are used for acquiring information, but they can be combined with other methods to create different types of learning courses. In those courses, the expositive component is normally used to provide orientation and basic concepts before going into more practical and complex stages.

Presentations, especially in video formats, can also be used to sensitize and influence learners' attitudes toward specific subjects.

Expositive methods include:

- Presentations: organized information on a specific topic
- Case studies: real, significant cases related to the topic
- Worked examples: examples of the topic with comments and explicit reference to the theory
- Demonstrations: illustrations of how a task can be performed

**Application methods**

Application methods involve the learners in practical activities which can range from simple exercises (such as the demonstration-practice method) to more complex methods like simulations or research activities.

When using these methods, it is helpful to have a tutor or instructor to provide guidance and facilitate reflection for learners.

**Demonstration-practice method**

This method is used to teach a procedure – usually a software procedure, such as how to generate a map using geographic information system (GIS) software – using directive learning. A procedure is first demonstrated by an expert or instructor, and then learners are asked to practice the procedure by interacting with the system or software.

| EXPOSITIVE METHODS | APPLICATION METHODS | COLLABORATIVE METHODS |
| --- | --- | --- |
| Presentations<br>Case studies<br>Worked examples<br>Demonstrations | Demonstrations -practice methods<br>Jobs aids<br>Case-based exercises<br>Role plays<br>Simulations and serious games<br>Guided research<br>Project work | Online guided discussion<br>Collaborative work<br>Peer tutoring |

Each method can be delivered in different formats, using different types of media and communication tools. For example, a presentation can be delivered as a Power Point file or as a recorded (or live) video presentation. An online discussion can be carried out in a discussion forum or through a Skype call.

Delivery formats are selected based on additional factors related to learners, technological and organizational constraints (e.g. budget) and available time.

The following table summarizes the main uses and the pros and cons of the various instructional methods. Most courses combine two or more e-learning methods, using different types of e-learning formats.

| | Method | Used to | Delivery formats | Pros | Cons |
|---|---|---|---|---|---|
| Expositive methods | Presentations,<br><br>case studies,<br><br>worked examples,<br><br>demonstrations | Facilitate knowledge acquisition (mainly<br><br>conceptual and factual knowledge),<br><br>orientation,<br><br>motivation, attitudinal change | Simple learning resources (documents and PPT presentations) | Quick to develop | No interactivity-passive learning |
| | | | Interactive e-learning lesson | Flexible: allows the use of various instructional techniques | Low/ medium interactivity-risk of passive learning<br>Correct use of instructional techniques and media elements is needed to avoid this risk |
| | | | Webcasting (video lessons and podcasts) | Quite easy to develop | No interactivity-passive learning<br>Need to consider available learners' Internet connection |
| | | | Webinars (video conference, audio conference, chat-based)<br>Virtual classroom | Allows interaction between instructor and learners<br>Requires low effort to convert materials | The instructor must be prepared to teach online and use adequate supporting materials.<br>Need to consider available learners' Internet connection |

| | Method | Used to | Delivery formats | Pros | Cons |
|---|---|---|---|---|---|
| methods | Demonstration -practice method | Develop procedural skills | Combination of animation and operational simulation | Allows learners to practice | Mainly used for software and simple medical procedures |
| | | | Virtual classroom (using application sharing) | | Need to consider available learners' Internet connection |
| | Job aids | Provide just-in-time information and guidance | Printed documents such as checklists, technical glossaries, templates, manuals | Promote transfer of learning to workplace performance | Sophisticated expert systems require complex design |
| | | | Online help and expert systems | | |
| | Case-based exercises | Develop job-specific cognitive skills | Interactive e-learning lesson | Good level of interactivity | Quite time-consuming to design |
| | | | Electronic simulation based on branched scenarios | Highly interactive | Time-consuming to design Multimedia simulations can be costly to produce Need support of an online tutor or instructor |
| | | | Individual tutored activity | Highly interactive + personalised feedback | Time-consuming to design Need support of an online tutor or instructor Need to consider available learners' |

| | | | | | |
|---|---|---|---|---|---|
| | | | | | Internet connection |
| | | | Online group activity | Highly interactive + social dimension | Time-consuming to design Need active support of an online facilitator Need to consider available learners' Internet connection |
| | Role plays | Develop interpersonal skills<br><br>Stimulate attitudinal change | Interactive e-learning lesson | Good level of interactivity | Quite time-consuming to design |
| | | | Electronic simulation based on branched scenarios | Highly interactive | Time-consuming to design Multimedia simulations can be costly to produce |
| | | | Online group activity | Highly interactive + social dimension | Time-consuming to design Need for considering available learners' Internet connection Need active support of an online facilitator |

| | Method | Used to | Delivery formats | Pros | Cons |
|---|---|---|---|---|---|
| Application methods | Simulations and serious games | Develop deep understanding of complex system | Symbolic simulations | Highly interactive Allow to practice high cognitive performance level (apply, analyse) | Time-consuming and costly to design and produce Need active support of an online tutor |
| | | | Learning games | Highly interactive Allow to practice high cognitive performance level (apply, analyse) | Time-consuming and costly to design and produce Need appropriate design to be effective Need active support of an online tutor |
| | Guided research | Active knowledge construction | Discussion forum, e-mail, chat, audio and video conference Wiki, blog, shared documents | Allow to practice high cognitive performance level (analyse, create) | Need active support of an online facilitator to provide help and feedback |
| | Project work | Active knowledge Construction | Discussion forum, e-mail, chat, audio and video conference Wiki, blog, shared documents | Allow to practice high cognitive performance level (analyse, create) | Need active support of an online facilitator to provide help and feedback |
| Collaborative methods | Online guided discussion | Stimulate critical | Discussion forum, | Allows for reflection, | Less effective than |

| | | | | | |
|---|---|---|---|---|---|
| | | thinking and reflection<br>Facilitate communication among learners<br>Develop interpersonal skills<br>Stimulate attitudinal change | e-mail, chat, audio and video conference | socialization and knowledge sharing | collaborative project work to achieve learning objectives<br>Need to consider available learners' Internet connection |
| | Collaborative work | Stimulate critical thinking and reflection<br>Develop problem solving skills<br>Develop interpersonal skills<br>Stimulate attitudinal change | Discussion forum, e-mail, wiki, blog, chat, audio and video conference, shared documents | Allows learners to make their knowledge explicit through argumentation | Need active support of an online facilitator to provide help and feedback<br>Need to consider available learners' Internet connection |
| | Peer tutoring | Stimulate critical thinking and reflection<br>Develop interpersonal skills<br>Stimulate attitudinal change | Discussion forum, e-mail, wiki, blog, chat, audio and video conference, shared documents | Good for train-the trainer projects | May need to be facilitated<br>Need to consider available learners' Internet connection |

## MODULE VIII: TRAINING MATERIALS FOR LEANERS

**Learning Objectives of the Module**

**At the end of this module, the trainee will be able to:**

- Understand various type of training materials
- Understand various Sources of Training Content
- Understand various guidelines for preparation of various type of training materials

1. **Some examples of materials developed for training are:**

    - Participant Manual
    - Instructor Manual
    - PPT/Overhead Visual
    - Charts
    - Handouts

2. **Sources of Training Content**

    - Observing and Listening
    - Surveys
    - Interviews
    - Tests
    - Reviewing Company Records
    - Experts
    - Internet
    - Journals

3. **Guidelines for Preparing Instructor Guide**

    - Include expected outcomes/objectives
    - State course timing
    - Include topics covered
    - Add instructions for conducting class
    - Use visual aids

4. **Guidelines for Preparing Overhead Visuals**

    - Use simple content
    - Include simple graphics
    - Make easy to read
    - Insert one topic per visual
    - Use seven +/- two items of information

## 5. Guidelines for Preparing Charts

- Write legibly
- Avoid light-colored markers
- Prepare ahead of time or build with learners
- Use for small-group work
- Use multiple colors
- Add graphics
- Keep words and phrases simple
- Place key topic in center of chart

**Different Types of Training Materials used in e-learning, app- based and blended learning**

- User manuals and technical documentation;
- Classroom course handouts and lecture notes;
- Presentations, such as PowerPoint slide shows;
- Documented case studies;
- Photographs, images, graphs, tables and other illustrative materials;
- Training materials, such as self-study guides, web guides and other distance learning materials; and
- Reference materials, such as specialized thesauri and glossaries.

When creating content/training/ instructional material for e-learning, app- based and blended learning following techniques can be used:-

- Story telling;
- Scenario-based approach;
- Toolkit approach; and
- Demonstration-practice method.

**Storytelling**

**What is storytelling?**

Storytelling provides information through a story narrative which places content in a realistic context and illustrates actions and decisions of one or more characters. It can use illustrations, pictures or video sequences.

**When should storytelling be used?**

The storytelling technique can be useful when you need to:

- Provide job-specific knowledge;
- Describe complex processes, where different actors perform different actions. The story can

clarify who does what and helps learners follow the flow of events;

- Add a human aspect to the lesson, since learners can follow the stories of real people; and
- Highlight the usefulness of the knowledge, because through storytelling you can show how this knowledge can be integrated into a real situation.

**Tips for using Storytelling**

- Create a realistic and credible context. This is very important for motivating learners, as it enables them to identify with the characters in your story. Learners need to feel that the story is similar to their own experience, and that the challenges faced by the characters could also happen in real life. This will help them appreciate the usefulness of the knowledge that you are presenting.
- Characters do not need to be present in every screen. "Story screens", which show characters' actions and dialogue, can be alternated with "theory screens" – i.e. screens providing concepts and guidelines. Story screens can be used to focus learners' attention on specific issues. For example, you can use them to:
  - Introduce a new topic: a story screen can introduce a topic (e.g. a specific task or a new problem that characters have to address) which is then followed by two or three theory screens to illustrate the topic; then, a story screen can be used again to introduce the next topic;
  - Illustrate critical actions or decisions – a story screen can describe important actions and decisions which often lead to common mistakes and doubts;
  - Develop practice exercises – a story screen can be used to ask the learner to answer questions about the story, applying guidelines to that specific situation.
- Be careful about gender and cultural issues when developing your characters. Know your target audience to better define the story characters' geographic provenience, names and style of dress. Dialogue among characters should be gender- and culture-sensitive.
- Try to make dialogue realistic by keeping sentences short and using informal language. Complex explanations should be provided in theory screens rather than included in a dialogue

**Scenario-based approach**

**What is a scenario-based approach?**

Lessons using this approach are built around a scenario. Typically, the scenario is a challenging situation in which learners are required to make decisions by choosing among different options. Learners are provided with all the information required to make the right decisions.

Feedback is provided to the learners for each option to explain why their choices are correct or incorrect. The feedback can also show the consequences of their decisions.

**When should a scenario-based approach be used?**

This approach allows learners to learn strategic principles by applying them to a concrete situation and observing the consequences of their decisions.

The scenario-based approach can be useful when you need to:

- Develop problem-solving or interpersonal skills;
- Teach strategic principles rather than conceptual and factual knowledge; or
- Develop an interactive exercise at the end of a conceptual unit, i.e. as a practice lesson following a set of lessons which provide underlying concepts and principles.

**Tips for using Scenario-based approach**

- Create a scenario. Think about how learners will use the information in the lesson, and build the scenario around it. Involve an expert to ensure that the scenario is relevant and credible.
- Work with the experts to understand which decisions a person would make in that scenario. Experts can share different experiences and possible outcomes.
- Provide learners only with the information required to make decisions. This can be given as part of the scenario description; as part of the feedback to learners' responses; or as part of information available on demand (e.g. through a "more information" link to additional information).
- Define possible choice options for each critical decision. Choices should not be obvious.
- Each choice generates a consequence; provide detailed feedback for each option by showing its consequences.

**Toolkit**

**What is a toolkit lesson?**

An e-lesson can take the form of a toolkit which allows learners to select from among a set of independent topics, rather than follow a sequential approach. Learners are invited to choose the topics that interest them the most.

**When should a toolkit lesson be used?**

Toolkit lessons are a good option when you have to present short pieces of content which belong to the same category, but are quite independent from each other. The content pieces can be descriptions of tools, steps of a procedure, stages of a process or frequently asked questions on a given topic.

Learners are invited to navigate the toolkit in a non-linear fashion, since a logical order is not necessary and learners might be interested only in some of the tools.

**Tips for using Toolkit**

- Provide an introduction before the menu page with an overview of the various tools to orient learners in selecting the menu options.

- Present each tool in a systematic way, such as by providing the same categories of information (e.g. description; purpose; example; strengths; weaknesses) for each tool.

**Demonstration-practice method**

**What is the demonstration-practice method?**

The demonstration-practice method is used to teach a procedure. You first demonstrate the procedure, and then you ask the learner to practice the procedure by interacting with the system.

**When should the demonstration-practice method be used?**

This method can be used to teach procedures, typically software procedures

**Tips for using Demonstration-practice method**

- You can use an animation (e.g. a flash animation) to demonstrate the procedure. This should be accompanied by a detailed verbal explanation, in the form of written text or audio comment.
- Allow the learner to control the animation by providing play, pause, stop and reload buttons.
- Develop an operational simulation to have learners practice the procedure.
- The operational simulation allows the learner to perform a number of actions (e.g. selecting options or typing text). If the learner does a wrong action, the system provides an error message, and if the learner does the right action, the system allows the learner to go to the next step until the end of the procedure.

# MODULE IX:TRAINING DELIVERY

**Learning Objectives of the Module**

## At the end of this module, the trainee will be able to:

- ❖ State the various stages of a training session and the activities involved at each stage.
- ❖ Conduct introductions and ice-breakers at the start of training sessions. within allocated time and with active participation of the learners.
- ❖ Inform learners about the objectives and structure of the training session.
- ❖ Gather learners’ expectations in line with the objectives of the course.
- ❖ Conduct the training using a range of training methods and training processes as specified in trainer’s guide and/or session plan.
- ❖ Use training resources as per the selected training method.
- ❖ Manage inappropriate behaviour in a training session professionally in line with organisational policy/guidelines.
- ❖ Conduct the closure activities such as summarizing key learnings, evaluating learning retention, obtaining feedback from trainees, securing the equipment effectively and within the allocated time.
- ❖ Evaluate the progress of learners in achieving the learning outcomes using various techniques.
- ❖ Explain the importance of documenting learning progress of the learners and providing them constructive feedback.

## Training Delivery

Delivery is the presentation of discussions, demonstrations, and exercises or activities that will help the learners gain the required knowledge and skills for performing a task or learning a subject.

Three factors must be in place for a successful learning experience to take place:

1. **Knowledge:** The instructor must know the subject matter, provide leadership, model the desired behavior, and adapt to the learners' needs and preferences.

2. **Environment:** The instructor must have the tools to transfer the subject matter to the learners, find adequate classroom space, and ensure the courseware, such as lesson plans and training aids, are on hand. He or she fuses the training tools with the needs of the learners to make learning flow naturally, rather than trying to force it.

3. **Involvement Skills:** The trainer must knows the learners. What are their real goals for being in the classroom? What tools do they need to help them succeed? What are some of the affective-tools that will help your learners succeed in the learning environment? Trainer must also coach the learners to become self-directed, intrinsically motivated, goal oriented, and open to learning.

## Key Focus Points to make Training Delivery Effective

1. Communication skills
2. Facilitation skills
3. Presentation skills

4. Training implementation
5. Apply health and safety practices
6. Demonstration of work/ practical skills
7. Training evaluation

All these points have been discussed in details in upcoming modules.

## MODULE X: COMMUNICATION SKILLS
## (LISTENING AND SPEAKING SKILLS)

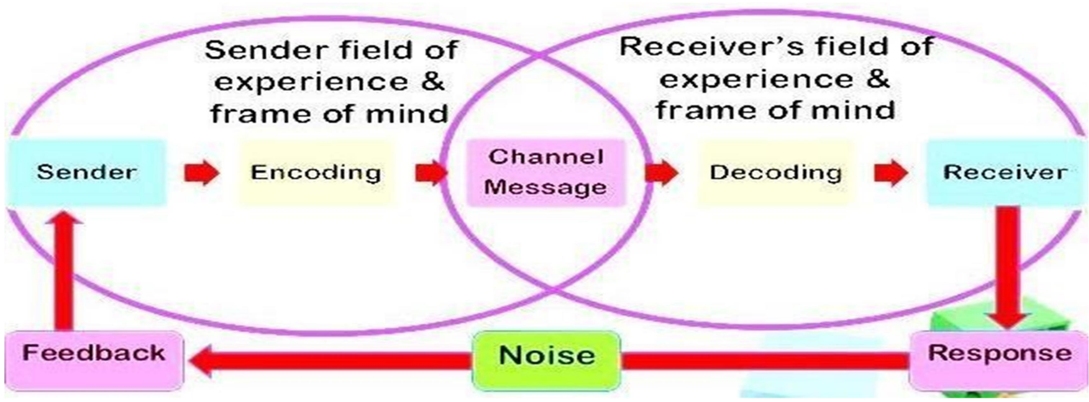
**Learning Objectives of the Module**

**At the end of this module, the trainee will be able to:**

- ❖ Understand Communication Skill
- ❖ Understand Communication Model
- ❖ Understand Barriers to Communication
- ❖ Understand Listening Skills

**Communication Model**

Communication is the imparting or exchanging of information by speaking, writing, or using some other medium.




The effectiveness of communication is the response that we generate, Nothing More Nothing Less

1. **Barriers to Communication**

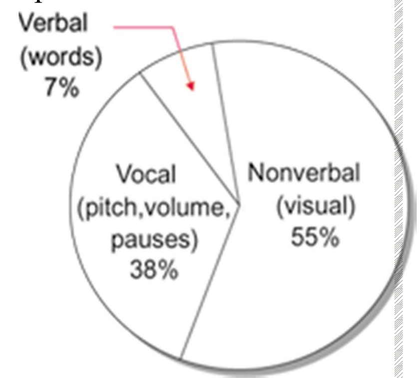
   A **communication barrier** is anything that prevents you from receiving and understanding the messages others use to convey their information, ideas and thoughts.
   Examples of barrier to communication are physical barriers, perceptual barriers, cultural barriers, language barriers, gender barriers, interpersonal barriers and many more.

2. **Points to remember for effective communication**

   - During communication your main aim is to: Connect with the audience, Put across your views and Ensure complete comprehension of your message.
   - You will achieve it when you use simple language and not jargon, use examples and logic to explain a topic, use different ways to put across the same point.
   - Evaluate understanding through: Questions and Exercises.

3. **Importance of Body Language in Communication.**

Body Language plays an important role in communication. During communication the words, tone and body language should be equally taken care of and if not then impact of words can go down up to 7%, vocal to 38% and body language impact to about 55%.




Some points to remember for impactful body language are:-

- Maintain eye contact and have smile on your face.
- Balance your stance. You have 2 legs. Use them both.
- Use your hands above the waist.
- Let your hands fall to your sides after using them.
- Match your facial expressions with the words and feelings.
- Don't move around or pace around without a purpose.
- Don't lock your hands in front / in back / in your pockets.
- Don't fiddle with objects - pen, papers, your glasses

**Pitch, Tone and Pace in communication**

To make communication effective trainer must emphasize on several other aspects like tone, pitch and pace along with pauses

**Pitch** is the degree of highness or lowness with which one speaks.

**Tone** refers to the emotion that is conveyed in the voice. Tone can show anger, impatience, joy, humor etc.

**Pace** refers to the speed of speaking.

Apart from these there are many other factors which impact the effectiveness of the communication like power of voice, accent, dialect, vocabulary, clarity of voice etc.

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4. **Listening Skills**

❖ **Pretend Listening**
Pretend listening happens when you pretend that you are listening but your focus is somewhere else.

❖ **Selective Listening**
During selective listening we pay attention to the speaker as long as they are talking about things we like or agree with. If they move on to other things we slip down to pretend listening or ignore them altogether.

❖ **Attentive/Active Listening**
Attentive listening occurs when we carefully listen to the other person and respond accordingly.

❖ **Empathetic Listening**
The fifth level of listening is **Empathetic Listening.** Empathic listening is the top level of listening. Discipline yourself to see it through the eyes of the user. This is called empathic listening.

5. **Application of Listening Skills**

•Appropriate brief encouragers
• Reflection of feelings /thoughts, behaviors and experience (content)
• Hearing the learner's concerns
• Paraphrasing (reflection of content)
• Using open and closed questions to expand or clarify understanding
• Understanding the learner's context
• Summarizing and closure

6. **Questioning Skills**
   During communication, we mostly use two types of questioning skills, which are:-
   - ✓ ***Open Ended Questions***
     - Solicit more than a one word response
     - Aim to get someone to talk
     - Are useful when you want someone to "Open Up"
   - ✓ ***Closed Ended Questions***
     - Solicit Yes, No or a one word response
     - Aim to control direction of conversation
     - Are useful when you want specific information

7. **Different Communication systems used by trainer at workplace are** email, telephone Calls, memorandums, internal website, management information systems, conference calls, video conferencing meetings and notice boards etc.

**Using communication tools for e-learning, app based learning and blended learning**

E-learning activities can be realized by using a range of communication tools – both synchronous and asynchronous.
Some of these tools, such as wikis, blogs and chats, are called "social media" or "Web2" tools, because they have a strong social component and allow people to work together to create products, such as a project document. The most common tools are:

- E-mail based tools
- Discussion forums
- Wikis and other shared writing/editing tools
- Blogs
- Webcasting
- Chat and instant messaging (IM)
- Polling
- Whiteboard and screen-sharing tools
- Application sharing
- Audio and video conferences

# MODULE XI: FACILITATION SKILLS

## Learning Objectives of the Module

At the end of this module, the trainee will be able to:

- ❖ Understand Facilitation skill
- ❖ Appreciate the benefits and applications of facilitation in the training.
- ❖ Be able to differentiate between process and content facilitation.
- ❖ Identify the core practices and skills required for effective facilitation.
- ❖ Understand how to stimulate group participation and positively handle conflict.

### 1. What Is Facilitation?

Facilitation is a technique in which a facilitator helps a group of people to understand their common objectives and assists them to plan how to achieve these objectives. In doing so, the facilitator remains "neutral", meaning he/she does not take a particular position in the discussion.

### 2. Why Do You Need It?

Facilitation is needed to increase participation, increase ownership, collective thinking, problem solving, and conflict management.

### 3. Role of a Facilitator during Facilitation

- Every individual has an opportunity for participation and input including drawing out the quiet participants and controlling the domineering ones
- Ground rules are established
- Group cohesion is maintained
- Information is captured in people's own words
- Instructions are given clearly and briefly
- Appropriate communication skills are modelled: listening; repeating and summarizing
- Behaviors being taught are modelled
- Time and pace are taken care of to ensure content is covered
- Discussion is kept on track and balanced among participants by monitoring time spent
- Disrupters are managed effectively
- Behavior that puts others at risk is observed, interpreted and addressed
- Discussion and group interaction are enhanced

### 4. Basic Facilitation Techniques

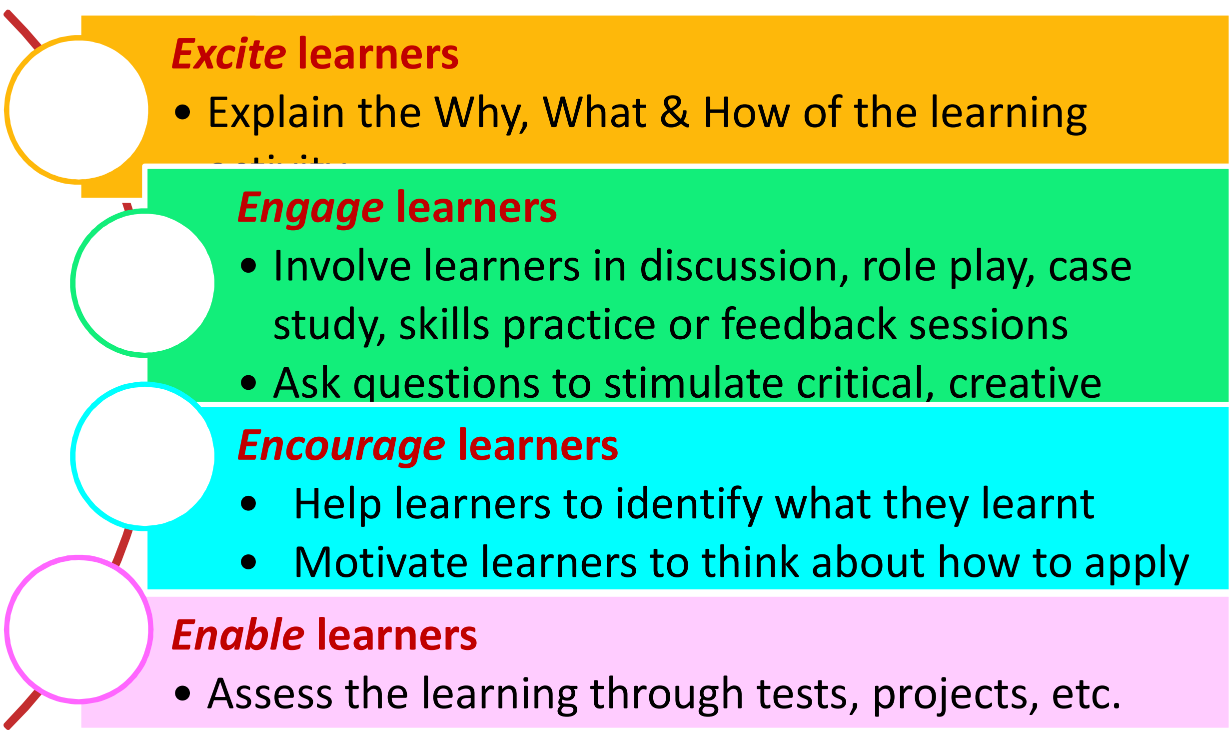
- Active listening
- Questioning
- Brainstorming
- Setting ground rules

- Encouraging participation
- Not criticizing
- Use existing knowledge in the group effectively

**5. Facilitating Training Sessions**

- Explain the objectives of the training session and how it would benefit the trainees.
- Gather learners' expectations and modify the session plan to incorporate the valid ones in the delivery which were not covered
- Ensure effective participation and group management by using basic facilitation techniques
  Basic facilitation techniques: active listening, questioning, brainstorming, setting ground rules, encouraging participation, not criticizing, use existing knowledge in the group effectively
- Apply learning principles to make reasonable adjustments to delivery – and session plans if required - according to individual and group learner needs
- Create and maintain a positive learning environment
- Be polite and courteous with all learners at all times
- Manage inappropriate behavior professionally as per established organizational policy.
- Take measures to ensure that learning can take place in a safe and comfortable environment

**6. Facilitating Skills (The 4E's Method)**



**Facilitating learners' activities for e-learning, app- based and blended learning**

In collaborative online-learning, a group of participants creates synergy around common learning goals. The online facilitator is responsible for ensuring that this process is organized, stimulating and efficient. The online facilitator performs the following tasks:

- Provides information on tasks, deadlines and places to upload or download files;
- Accompanies participants during their work by checking workflow and individual or group results, composing working groups and interfering if necessary into group dynamics in case of conflicts or production blockades;
- Provides summaries at the end of units or phases;
- Answers questions concerning tasks, deadlines or use of learning tools;
- Motivates participants to produce, reflect, animatedly exchange ideas and initiate discussions;
- Assures links to other partners in the process (e.g. Administrator, subject matter expert, technician); and
- Organizes the final evaluation of the e-learning event.

## MODULE XII: PRESENTATION SKILLS

**Learning Objectives of the Module**

At the end of this module, the trainee will be able to:

- Use a structured presentation methodology to prepare presentation material and effective visual aids
- Determine and develop personal presentation style
- Find ways to overcome nervousness for presentation
- Recognize presentation weak spots and areas for improvement
- Learn, practice and acquire the skills necessary to deliver effective,presentation with clarity and impact

### 1. Ingredients of Successful Presentation

- STRUCTURE
- CONTENT
- DELIVERY

### 2. Analyzing Your Audience

- Demographic Analysis involves:
  - Age
  - Gender
  - Culture
  - Ethnicity
  - Race
  - Religion, And
  - Educational Level

- Attitudinal Analysis involves:
  - Attitudes
  - Beliefs
  - Values

- Environmental Analysis involves:
  - Seating arrangement, lighting, equipment and facilities

### 3. How to make a Presentation Engaging and Relevant

- Speaking with appropriate tone and pitch
- Using language appropriate to audience
- Presenting in a confident and enthusiastic manner
- Demonstrates a sound knowledge of the subject matter
- Delivering information in a clear, concise, and logical manner
- Encouraging and dealing appropriately with questions
- Using active listening techniques such as paying attention, observing behavior and body language, interpreting body language, paraphrasing, reflecting and respectful responding
- Effectively using various audio-visual media to enhance presentations
- Revise the points discussed at regular intervals
- Involve every participant in some activity by rotation

### 4. If you are not getting a positive response from your audience there are things you can do:

- Try to talk more to the audience
- Tell a story.
- Use an example.
- Remind your listeners of the motivation.
- Eliminate some boring facts or statistics.
- Use appropriate humor.
- Pause for dramatic effect.
- Ask for feedback or ask questions.

### 5. How to Open a Session?

- Get positive attention swiftly
- Lead naturally into your presentation
- Build rapport goodwill
- Create points of agreement
- Ask a question or start with a polling question
- Tell a story
- Give good news or compliment

### 6. How to Pack Your Message?

- Use simple language
- Help your audience visualize what you are saying
- Organize your thoughts before speaking
- Narrow down and recap your key ideas

## 7. How to Close Your Message?

- Leave a positive lasting impression
- Persuade with logic
- Inspire with emotion
- Be brief
- Build to a crescendo so your last words have impact

## 8. Objection Handling

❖ Never argue.
❖ Allow your prospect to answer his or her own objections
❖ Don't interrupt an objection.
❖ Feed the objection back.
❖ Ask for more detail.
❖ Provide the answer.


## 9. Handling Difficult Situations/Classroom Disruptors

❖ Ask for ground rules at the beginning of the session
❖ Break into smaller groups
❖ Use go-arounds. Go around the circle and everyone can speak in turn. This emphasizes the need to wait one's turn and to listen carefully.
❖ Invite the disrupter to speak privately with you or your co-facilitator, if you have one.
❖ Ask the group for help in addressing the problem

**Note: How to foster integration and build motivation within the group of learners in virtual classrooms**

- **Trained trainers/instructors in online learning.**

  Many instructors are subject matter experts but they aren't trained in adult education or online learning. You can't just transfer an in-person learning experience to an online platform. The course's curriculum, content and delivery must be designed specifically for online learning. An online instructor must understand not only how learners learn but also how to leverage technology to help them take in and retain information.
  Even if an instructor has scored well on conference evaluations, an online environment requires a new skillset. Instructors have to practice being themselves on camera—an attention-holding, confident and personable self.
  An online learning experience can become an isolating experience unless the instructor knows how to and makes time to support participants and encourage them to interact with peers.

- **Give participants a sense of ownership and control.**

  People are more motivated and engaged when they know they have some say in what they're doing. Give participants some choice in assignments. They may lean toward diving deeper into specific topics or may prefer one delivery method over another. Self-assessments provide another opportunity for taking control over one's learning destiny. If a participant believes a lesson is too basic, allow them to skip over it or dive deeper based on their self-assessment or quiz results.
  Give Participants an opportunity to make their voice heard by asking for feedback on the learning experience and content. Don't wait for the end of the course to find out about adjustments you can make along the way. For example, you may think participants will enjoy group projects, but find out they actually dread the idea.

- **Plan for delivery diversity.**

  Engage learners' brains by using a mix of content delivery methods—video, text, audio, and presentations. Bring in guest instructors and speakers so they don't get tired of seeing the same face and hearing the same voice. Keep the element of surprise alive. Don't ignore the effect of audio: when someone talks into our ear, it's strangely more intimate and we're more likely to connect with that person and what they're saying.

- **Be a storyteller.**

  We love good stories—emphasis on good. We especially love reading or hearing stories that we can relate to in some way.
  Stories tap into emotions, so we're apt to remember information delivered in stories. If you're reading something difficult, you're more likely to "get it" if the writer uses an example to illustrate what they're trying to get across.
  Assign stories (or case studies) to read, or have participants watch someone tell a story about how they applied a principle or practice in real life. Use stories to illustrate the impact of what they're learning—an additional motivator.
  Don't be afraid to use video. A cheesy video of instructors and members acting out a story may elicit some uncalled for grins but the point will be made and remembered Stories are a good opportunity to make your course timely too, our next topic.

- **Regularly update course content.**
  The course you deliver in 2018 should not be the same course you delivered in 2016. One way to differentiate your online course is to update the content with the latest:

  - Research and developments
  - News
  - Articles, videos, podcast episodes and conference session recordings
  - Policies and regulations
  - Opinions
  - Emerging trends and practices
  - Make it obvious that you're not delivering a stale program. Keep your course relevant, timely, and current and you'll be more likely to pique participant interest and hold their attention.

- **Assign success coaches.**

  Success coaches take your online learning program to the next level. This value-add won't be expected but proves your association is investing in learners' professional growth.
  Online learning can be a lonely experience. The more you can make it personal by connecting in some way with learners, the more likely they'll stay engaged and become a raving fan.
  Coaches can proactively reach out to participants at specific course milestones. They can also be part of the intervention effort when a participant is at risk.

- **Encourage accountability.**

  Leverage the email notification feature on your learning management system. Schedule and send automated emails to participants who don't log in for a certain number of days or don't complete an assignment on time. Or, you can set it up so the instructor receives the notification instead and they reach out personally to participants to see what's going on with them.
  Remind participants they're not alone and not being ignored by having instructors and coaches check in with them periodically. These check-ins are a good time to get feedback too.
  Study groups can also act as accountability reminders—just like meeting friends at the gym. Participants need to feel a sense of inner accountability too. And you can help with that—our next topic.

# MODULE XIII: TRAINING IMPLEMENTATION

**Learning Objectives of the Module**

**At the end of this module, the trainee will be able to:**

- Understand trainer delivery requirements
- Learn room styles and arrangements
- Understand techniques to create and maintain a positive learning environment
- Use of ice breakers
- Learn empowering processes used by trainer during training
- Understand strategies to deal with client issues and emotions
- Understand housekeeping responsibilities and ownership as trainers

## Trainer Delivery Requirements

As we have seen, training requires a lot of planning in every stage and training delivery is not any different. As a trainer we need to consider a lot of factors to make sure that we are prepared and the participant experience is not compromised.

We need to focus on some of the following key factors while planning any training factors:

### Venue Location

- The training venue should be located in an area that is convenient to everyone
- It should preferably have an easy access to public transport
- It should preferably be in an area which had a medical shop and stationary in close proximity
- If the participants are likely to drive to the venue, there should be adequate parking arrangements

### Room Access

- The building should be easily accessible to wheelchair users
- If the training room is on 1st floor or above, it should be accessible by lift
- The training room should have enough space for the wheelchair to move without any obstruction
- There should be indoor and outdoor breakout spaces depending on the activities planned

### Space

- The room needs to comfortable seat all the participants, trainers and observers.
- There should be space for indoor activities and group discussions
- There should not be any wires/objects which might lead to the participants tripping over or falling
- Room shape should be conducive for group discussions to occur. Square rooms are the best for this purpose

**Lighting and HVAC (Heating, Ventilation and Cooling)**

- Training room should have sufficient daylight with blinds to block sunlight when using a projector
- The air conditioning should be adjustable with easy access to thermostat
- In case the room is not air conditioned, there should be sufficient cross ventilation. The fans should not be noisy as they can make it difficult for the trainer and participants to be heard
- The ventilation should be good even with the room being filled with participants
- If the session is being conducted in peak winters, it is a good idea to look for a room with wooden or carpeted flooring

**Equipment and stationary**

Here is a sample list of equipment and stationary. As a rule always check the equipment to ensure that it is working properly before starting the training for the day:

- Whiteboard and permanent markers (Most basic training pre-requisite and very important)
- Projector
    - Audio arrangements
    - Slide changer/clicker (if needed)
    - Any equipment required for demonstration/ evaluation purpose
    - Enough power point sockets
    - Wi-Fi and internet access where needed
    - Laptop/ Personal computer where the training content has been saved
    - Flipchart, flipchart stand, whiteboard, whiteboard stand
    - Chart papers
    - Notepads and pens for participants
    - Name Tags if needed

**Food and Beverage**

- There should be a separate eating area as far as possible
- Drinking water should be replenished frequently
- Specific dietary consideration like vegan diet, any allergies etc. should be taken into account

**Safety**

- Ensure that the floors are not slippery
- Staircases should have guardrails to prevent fall
- There should be no lose wires running across the floor
- In case the training is happening at site or in a plant location, participants and trainer should wear personal protection equipment
- In case of on-site training, safety instructions should be given to the participants

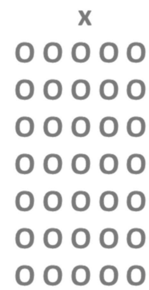
and trainer
- Emergency evacuation instructions should be given in the beginning of the training

**Outdoor Activity Area**

- Outdoor activity area should be safe and free from any obstructions and sharp objects
- The ground should have a uniform level to prevent any falls
- Weather conditions should be taken into account while performing outdoor activities
- While conducting outdoor activities on the roof, ensure that the participants are away from the railing at all times

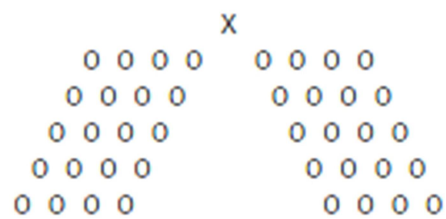
## ROOM STYLES AND ARRANGEMENTS

**THEATRE STYLE OR Traditional Seating**



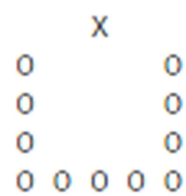
- Best used for short lectures to large groups
- Communication tends to be one way
- Trainer cannot see the learners in the back

**Modified Traditional Seating**



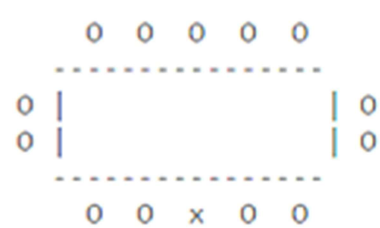
- There is more participation
- Allows the trainer to see all the learners
- Reduces space between trainer and learners as trainer can move up aisle
- Best used for short lectures to large groups

**HORSE-SHOE Seating**



- Non-verbally encourages participation by allowing eye contact between the trainer and all the learners
- The trainer is able to move closer to each learner
- Works well when all learners must be able to see a demonstration
- Works good when learners will be involved in large group discussions

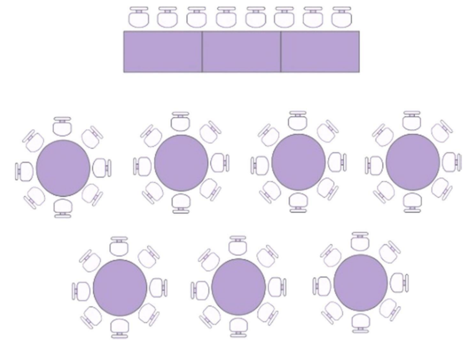
**CONFERENCE OR RECTANGLE Seating**



- Suitable for meetings and has a business atmosphere
- The seats at the short dimensions of the table are often seen as leadership positions
- If used, the learners should be forced to take distinctly different positions every now and then

(i.e. randomly shift the name cards)

**BANQUET-STYLE Seating**



- Learners can work in small groups on exercises and projects
- Communication between trainer and learners is more difficult
- Trainer must move between groups during lectures and activities
- Good for courses that require a lot of group work

**Trainer's Space**

- Is the area from where you will speak neat and looking professional?
- Is the distance between you and the learners appropriate?
  - If too near = intimidating
  - If too far = lacking in warmth

**Tips**

Stand in front of the room and draw an imaginary line from the learner on your left to the learner on your right. You should stand no more than 3 feet behind the line.

**Techniques to create and maintain a positive learning environment**

- Encouraging learner participation.
- Using interactive learning approaches to transfer skills and knowledge to learners.
- Using the diversity of the group as a resource to support learning.
- Using facilitation skills to ensure effective participation and group management.
- Using presentation skills to convey understanding of key concepts and central ideas.
- Monitoring non-verbal and verbal communication of participants.
- Using learning resources to enhance the learning experience for all learners.
- Create low stressed environment where it is safe to make mistakes yet expectation of success is high.
- Ensure the subject is relevant.
- Use humour, offer encouragement, provide regular breaks, show support for their efforts
- Engage left as well as right brain
- Challenge them to think through and explore what is being taught and to make personal sense of the subject matter
- Delivering at appropriate pace.

- Ensuring and encouraging two-way communication including provide opportunities for learners to seek clarification on central ideas and concepts, and adjust the presentation to meet participant needs and preferences.
- Summarizing key concepts and ideas at strategic points to facilitate learner understanding.
- Monitoring learner progress with tasks and learning.
- Activities based on session plan.
- Measuring the achievement of learning outcomes by formative assessment

**Use of Ice Breakers**

- Ice breakers are aimed at setting the pace of any training session.
- This is the first formal interaction between the trainer and all the participants.
- Ice breakers generally are short and `fun' activities where the participants get an opportunity to introduce themselves.
- Example of Ice Breakers:-
    - You may arrange participants according to their birthdays/ the actor of their choice/pet that they would like to won, pair them up and ask them to introduce each other.
    - Tell us your name and three humorous things about yourself;
    - Describe yourself with an adjective that begins with the same letter as your name
    - Give a number from (1-4) to each individual and then team up all the members with the same number. Let each team then give themselves a name and introduce their team in the most unique manner.

**Empowering processes used by trainer during training**

- Active listening
- Identifying and affirming learner strengths and opportunities
- Reframing, summary and closure
- Helping contain overwhelming feelings to facilitate coping
- Using questions and concreteness to focus the learner on identifying immediate needs and concerns
- Setting realistic achievable goals for the support session
- Brainstorming consequences
- Exploring options and informed learner choices
- Identify achievable tasks to be addressed after the session

**Strategies to deal with client issues and emotions**

- Managing tone, pitch and pace of voice
- Externalise learner emotions
- Awareness of personal vulnerabilities which may be triggered during a support session
- Containment skills
- Supervision and debriefing

**Housekeeping responsibilities and ownership as trainers**

The role of the trainer is not just limited to knowledge transfer. The trainer needs to assume complete responsibility of events that take place in the training room before, during and after the workshop.

Depending on the kind of intervention and the kind of training facility, each trainer should have a checklist to ensure that these critical aspects are not overlooked. Here are some of the parameters that can be included in the checklist.

**Before training**

- Arrive at the training venue at least 45 to 60 minutes in advance.
- Ensure that the seating arrangement is as per the plan and there is enough room for the participants to move around. Sometimes seating arrangement needs to be changed to create more room for the activity.
- Check to ensure that all the training material is in place and the participant material is neatly placed on the table.
- Check all the equipment to ensure that it is working fine. Ensure that laptop, speaker and projector are working fine
- In case there is any damage to any equipment, furniture or premises bring it to the notice of the appropriate person.
- Know where the light switches are as the light in the room would need to be dim while playing videos or while projecting slides and more during the activities/discussions.
- Know the location of fire exits and rest rooms.
- Identify any potential safety hazards in the environment and ensure that they are removed.

**During training**

- Share information about break timings and break areas.
- Set ground rules for use of mobiles, laptops, cross conversations and expectations from the participants/ trainer.
- Explain how and when you would want the questions to be addressed - anytime during the session or during dedicated question answer sessions.

- In case participants need to move out of the room during the session for any reason, advise them to use the rear door so that it does not disturb the session.
- Identify if there is any participant with special needs. Inform the appropriate person/ facility supervisor in case he/she might need any assistance.
- Be mindful of the language in case there are learners with special needs. For example, if there is a learner who is visually impaired, avoid using terms like 'As we can see', 'Let's look at our training manuals'.
- Check with the learners if they are comfortable with the air conditioning, food etc.

**After training**

- Handover unused material to the person concerned or arrange for it to be transported to office
- Have the facility supervisor confirm that the equipment is in order and that there have been no damage to equipment or facility
- Check if any learner has left the material/ personal belongings and hand those over to the person concerned as per the organizational guidelines
- Complete learning records like post training assessment and feedback form accurately and inform the relevant stakeholders.

# MODULE XIV: APPLY HEALTH AND SAFETY PRACTICES

**Learning Objectives of the Module**

**At the end of this module, the trainee will be able to:**

- Explain and demonstrate Health Safety and Environment (HSE) practices.
- Identify relevant Occupational Health and Safety (OHS) regulations and procedures.
- Identify relevant statutory legislation and environmental legislation applicable to the organisation and the area of operation.
- Explain school/centre health, safety and emergency procedures, techniques and practices.
- Identify the different health and safety emergencies that may occur at the workplace.
- Take required actions promptly within the scope of responsibilities
- Comply with school/centre health, safety and emergency procedures, techniques and practices.
- Adhere to evacuation and reporting procedures in case of a fire.
- Seek assistance promptly from colleagues and/or other authorities where/when appropriate.
- Assist with the general care and wellbeing of learners, including attending to learners with minor illnesses.
- Assist learners in need of minor first aid in accordance with school or centre procedures.

## Healthy and Safety Practices

### Apply relevant health and safety practices in a training / assessment environment by

- Promoting a safe working environment and adhere to risk management strategies for clients, colleagues and others who enter the workplace
- Identify, control and report health and safety issues relating to immediate work environment according to procedure
- Apply appropriate personal protective equipment (PPE) where required and document safety records.
- Explain and demonstrate Health Safety and Environment (HSE) practices.
- Explain school/Centre health, safety and emergency procedures, techniques and practices.
- Identify relevant Occupational Health and Safety (OHS) regulations and procedures.
- Identify relevant statutory legislation and environmental legislation applicable to the organization and the area of operation.

### Maintain a safe environment by

- Recognizing health and safety related hazards in the training and assessment area
- Follow procedures and instructions for dealing with hazards
- Comply with Centre health, safety and emergency procedures, techniques and practices.
- Document and report all hazards, accidents and near-miss incidents
- Provide guidance and support to learners on the safe use and care of equipment and resources
- Take appropriate steps, if required, to maintain personal safety of self and others

**Maintain a healthy and hygienic environment by**

- Maintaining the training and assessment area in a clean and tidy condition
- Responding appropriately to learners who require assistance with personal care or hygiene
- Ensure all learners or candidates follow personal hygiene and grooming standards as required
- Provide assistance with the general care and wellbeing of learners, including attending to learners with minor illnesses
- Assist learners in need of minor first aid in accordance with school or Centre procedures
- Select different types of waste and various types of colour coded bins/containers used for disposal of waste.
- Discuss the appropriate process of categorization, disposal, transportation, and treatment of waste and its significance.

**Deal with emergency situations by**

- Identify the different health and safety emergencies that may occur at the workplace.
- Recognizing emergency and potential emergency situations promptly and take required actions
- Following emergency procedures correctly
- Adhere to evacuation and reporting procedures in case of a fire.
- Seeking assistance promptly from colleagues and/or other authorities where appropriate
- Take required actions promptly within the scope of responsibilities.
- Reporting details of emergency situations accurately, and including accurate completion of accident and incident report forms

## Respiratory hygiene, Hand-washing practices and Social distancing Practices

A trainer must follow following points to promote respiratory hygiene, hand-washing practices and social distancing practices during his training:

- Discuss the concept of disease outbreak, epidemics, and pandemics and their impact on society at large.
- Explain the significance of following prescribed rules and guidelines during an epidemic or a pandemic.
- Differentiate between self-quarantine and self-isolation and their significance.
- Discuss the significance of social distancing and alternate ways of carrying out everyday tasks (use of e-payment gateways/online learning/virtual meetings, etc.) during a pandemic.

- Discuss and demonstrate the significance of conforming to basic personal and workplace hygiene practices such as washing hands, using alcohol-based hand sanitizers, examining office supplies/deliveries and their sanitization, etc.
- List various surfaces that may serve as potential fomites at workplace.
- Identify and display the correct way for PPE such as face masks, hand gloves, face shields, PPE suits, etc. to be used during training and workplace and the process of donning, doffing, and discarding them
- Discuss the importance and process of identifying and reporting symptoms to the concerned authorities.
- Discuss organizational hygiene and sanitation guidelines and ways of following them and reporting breaches/gaps if any.
- Explain the importance and mechanism of proper and safe disposal, transportation, and treatment of waste.
- Discuss the ways of dealing with stress and anxiety during a disease outbreak.
- Show how to sanitize and disinfect one's work area regularly.
- Demonstrate appropriate social and behavioral etiquette (greeting and meeting people, spitting/coughing/sneezing, etc.).
- Prepare a list of relevant hotline/emergency numbers.
- Explain the importance of incident reporting.
- Discuss the ways of risk assessment and management.
- Discuss the ways of dealing with stress and anxiety and providing support during an epidemic or a pandemic

**Respiratory Hygiene**

The following measures to contain respiratory secretions are recommended for all individuals with signs and symptoms of a respiratory infection.

- Cover your mouth and nose with a tissue when coughing or sneezing;
- Use in the nearest waste receptacle to dispose of the tissue after use;
- Perform hand hygiene (e.g., hand washing with non-antimicrobial soap and water, alcohol-based hand rub, or antiseptic handwash) after having contact with respiratory secretions and contaminated objects/materials.

A trainer should ensure the availability of materials for adhering to Respiratory Hygiene/Cough Etiquette in classrooms for participants and visitors.

Provide tissues and no-touch receptacles for used tissue disposal.

Provide conveniently located dispensers of alcohol-based hand rub; where sinks are available, ensure that supplies for hand washing (i.e., soap, disposable towels) are consistently available.

During periods of increased respiratory infection activity in the community (e.g., when there is increased absenteeism in training centre and work settings and increased medical office visits by persons complaining of respiratory illness), offer masks to persons who are coughing. Either procedure masks (i.e., with ear loops) or surgical masks (i.e., with ties) may be used to contain respiratory secretions (respirators such as N-95 or above are not necessary for this purpose). When space and chair availability permit, encourage coughing persons to sit at least three feet away from others in common waiting areas.

**Social distancing Practices**

Social distancing, also called "physical distancing," means keeping a safe space between yourself and other people who are not from your household.

To practice social or physical distancing, stay at least 6 feet (about 2 arms' length) from other people who are not from your household in both indoor and outdoor spaces.

Social distancing should be practiced in combination with other everyday preventive actions to reduce the spread of any kind of infection.

**Tips for Social Distancing**

When going out in public, it is important to stay at least 6 feet away from other people and wear a mask to slow the spread of infection. Consider the following tips for practicing social distancing when you decide to go out.

- **Know Before You Go:** Before going out, know and follow the guidance from local public health authorities where you live.
- **Prepare for Transportation:** Consider social distancing options to travel safely when running errands or commuting to and from work, whether walking, bicycling, wheelchair rolling, or using public transit, rideshares, or taxis. When using public transit, try to keep at least 6 feet from other passengers or transit operators – for example, when you are waiting at a bus station or selecting seats on a bus or train. When using rideshares or taxis, avoid pooled rides where multiple passengers are picked up, and sit in the back seat in larger vehicles so you can remain at least 6 feet away from the driver. Follow these additional tips to protect yourself while using transportation.
- **Limit Contact When Running Errands:** Only visit stores selling household essentials in person when you absolutely need to, and stay at least 6 feet away from others who are not from your household while shopping and in lines. If possible, use drive-thru, curbside pick-up, or delivery services to limit face-to-face contact with others. Maintain physical distance between yourself and delivery service providers during exchanges and wear a mask.
- **Choose Safe Social Activities:** It is possible to stay socially connected with friends and family who don't live in your home by calling, using video chat, or staying connected through social media. If meeting others in person (e.g., at small outdoor gatherings, yard or driveway gathering with a small group of friends or family members), stay at least 6 feet from others who are not from your household. Follow these steps to stay safe if you will be participating in personal and social activities outside of your home.
- **Keep Distance at Events and Gatherings:** It is safest to avoid crowded places and gatherings where it may be difficult to stay at least 6 feet away from others who are not from your household.

If you are in a crowded space, try to keep 6 feet of space between yourself and others at all times, and wear a mask. Masks are especially important in times when physical distancing is difficult. Pay attention to any physical guides, such as tape markings on floors or signs on walls, directing attendees to remain at least 6 feet apart from each other in lines or at other times. Allow other people 6 feet of space when you pass by them in both indoor and outdoor settings.

- **Stay Distanced While Being Active:** Consider going for a walk, bike ride, or wheelchair roll in your neighborhood or in another safe location where you can maintain at least 6 feet of distance between yourself and other pedestrians and cyclists. If you decide to visit a nearby park, trail, or recreational facility, first check for closures or restrictions. If open, consider how many other people might be there and choose a location where it will be possible to keep at least 6 feet of space between yourself and other people who are not from your household.

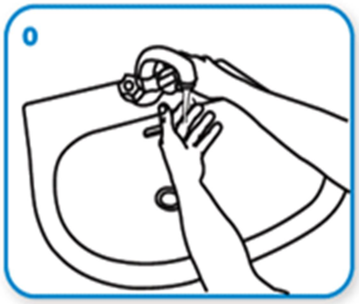
**Hand-washing practices**

Clean hands protect against infection. Protect yourself by:-

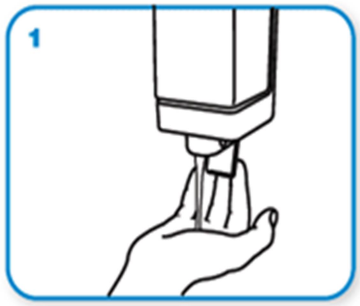
- Clean your hands regularly.
- Wash your hands with soap and water, and dry them thoroughly.
- Use alcohol-based handrub if you don’t have immediate access to soap and water.

**How to wash hands properly?**

Washing your hands properly takes about as long as singing "Happy Birthday" twice, using the images below.

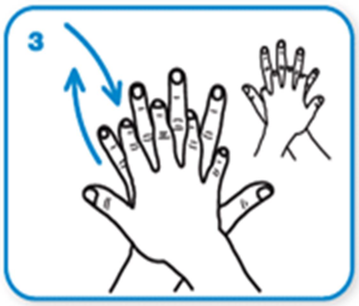



Wet hands with water

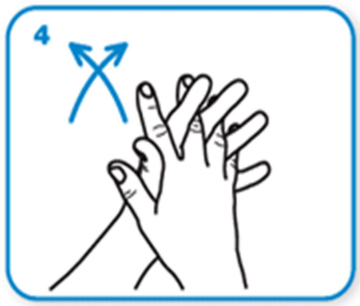



apply enough soap to cover all hand surfaces.

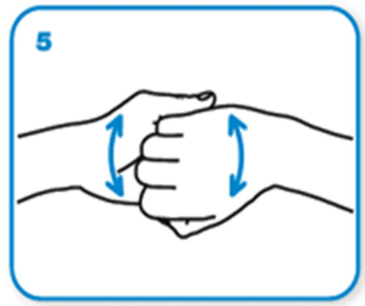

Rub hands palm to palm




right palm over left dorsum with interlaced fingers and vice versa



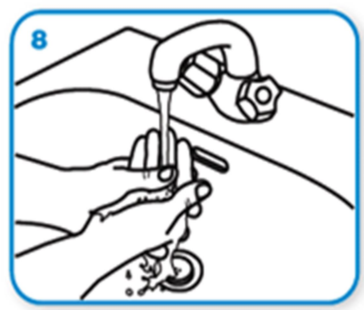

palm to palm with fingers interlaced




backs of fingers to opposing palms with fingers interlocked

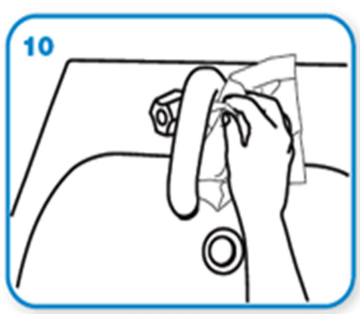

rotational rubbing of left thumb clasped in right palm and vice versa


rotational rubbing, backwards and forwards with clasped fingers of right hand in left palm and vice versa.

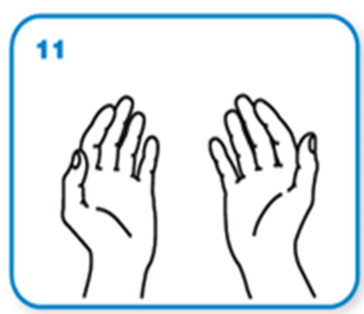



Rinse hands with water


dry thoroughly with a single use towel




use towel to turn off faucet




...and your hands are safe.

# MODULE XV: DEMONSTRATION OF WORK/ PRACTICAL SKILLS

**Learning Objectives of the Module**

## At the end of this module, the trainee will be able to:

**Introduction to Practical Skills Training**

- Explain the importance of practical skills training.
- State the advantages and disadvantages of demonstration and practice as a skills training tool.
- Describe the difference between on-the-job training and training in a simulated environment.
- Describe key characteristics of effective demonstrations such as purposefulness, clarity, completeness, speed and duration optimization, correct sequencing, freedom for errors and cost optimization.
- Describe how to effectively structure demonstrations and practice sessions.
- Describe the factors that are likely to prevent learning during demonstration and practice sessions and how to overcome them.

**Prepare for Work-Skills Demonstrations**

- Explain the importance of planning how to conduct a demonstration and rehearsing it before the actual demonstration.
- State the preparatory activities to be conducted before starting a demonstration.
- Identify the purpose and topics of the demonstration, time allowed for the demonstration and location and facilities where the demonstration will take place.
- Develop the order or sequence of the demonstration, for overall coverage of topic(s) as well as coverage of each task within the topic, to ensure ease of understanding for audience and the efficient use of resources.
- Confirming that all materials, tools and equipment are present and in working order, including safety equipment for the demonstration.
- Rehearse the demonstration without the audience and identify areas that need specific attention.

**Delivery of Work Skills Training**

- Brief the audience on each activity with respect to it's purpose, procedure and site and safety precautions before the demonstration.
- Ensure all learners have access to necessary equipment and materials for practicing on and learning the work skills.
- Explain each step in the task or procedure
- Perform all the steps of the demonstration skillfully and in proper sequence and in a pace and manner that is easy for learners to follow.
- Provide opportunity for each learner to practice each step in the task or
- procedure required to be learnt, immediately after the demonstration.
- Provide opportunities for participants to correct mistakes during practice.
- Ensure steps are taken to protect the participant as he or she performs each step of the procedure from hazards.
- Conduct a review and summarization of activities as required.
- Collect feed-back that will benefit future demonstration planning.
- Ensure that the equipment and tools are secure after the demonstration in accordance with appropriate procedures.

**Introduction to Practical Skills Training**

Learners must continuously reconstruct their skills and be able to apply their theoretical knowledge in actual work. The development of expertise in skills is a long process, during which theoretical and practical elements of learner's knowledge are integrated into a coherent whole. It is important to foster learner's learning and integration of theoretical knowledge in practice during training. One tool for this is to pay more attention to practical knowledge in the theoretical part of the curriculum. After many studies and researches it has been found that the practical training increases learner's understanding of theoretical knowledge and their motivation to study.

The two most effective and common methods for practical skills training are:

- **On- the Job Training**

  On the job training is a form of training provided at the workplace. During the training, trainees/ employees are familiarized with the working environment they will become part of. Trainees/ employees also get a hands-on experience using machinery, equipment, tools, materials, etc. Part of on-the-job training is to face the challenges that occur during the performance of the job. An experienced employee or a manager are executing the role of the mentor who through written, or verbal instructions and demonstrations are passing on his/her knowledge and company-specific skills to the new employee. Executing the training on at the job location, rather than the classroom, creates a stress-free environment for the employees. On-the-job training is the most popular method of training. Its effectiveness is based on the use of existing workplace tools, machines, documents and equipment, and the knowledge of specialists who are working in this field. On-the-job training is easy to arrange and manage and it simplifies the process of adapting to the new workplace. On-the-job training is highly used for practical tasks. It is inexpensive, and it doesn't require special equipment that is normally used for a specific job. Upon satisfaction of completion of the training, the employer is expected to retain participants as regular employees.

  For trainees/ employees, on-the-job training is beneficial because it allows them to learn a new skill or qualification within their field of work in a timely matter. During on-the-job training, they are engaged in the real process instead of the simulated learning process. On-the-job training leads to more opportunities to grow

- **Training in a Simulated Environment**

  Simulation training is the creation of a **true-to-life learning environment** that mirrors real-life work and scenarios. Trainees can put real knowledge and skills into practice not just by reading books on theory or listening to lectures, but through physical, hands-on activity.

This type of training is so effective as it takes into account several of the learning styles preferred by different learners. Not everyone learns visually, or through auditory materials, and simulation-based training also considers the needs of kinesthetic learners who flourish through practical exercises.
Simulation-based training is a highly effective way of transferring key skills to trainees in a cost-effective manner. It provides an optimum way for employers to assess how well their trainees are putting skills into practice, and the decisions they are making in front of simulated real life situations. Learning in a safe and managed environment provides essential hands-on experience that integrates key theoretical concepts with interactive, simulated situations.
It provides learning "just like the real thing." Simulation-based training can be applied across many different fields..

**<u>Intorduction to Demonstration</u>**

Demonstration of work skills is one of the most important methods during the skill development training as it enhances the participation and understanding of the learner towards the topic.

Demonstration involves showing by reason or proof, explaining or making clear by use of examples or experiments. Put more simply, demonstration means 'to clearly show'

**Demonstration = words (audio) + performance (visual information)**

**Characteristics of effective demonstrations**

- Purposefulness
- Clarity
- Completeness
- Speed and duration optimization
- Correct sequencing
- Freedom for errors
- Cost optimization

**Advantages of demonstration as a method of training**

- The ability for participants to see, feel and participate directly in the learning process and the enhanced learning ability of those being instructed.
- It makes the pupils familiar with the nature and use of tools/ equipment.
- Experiments requiring special skill will merely be shown by the trainer. In this method no time is wasted.
- This method proves more useful if the trainees are told beforehand about it.
- It helps in involving various sense to make learning permanent

- It develops interest in the learners and motivates them for their active participation
- It helps in achieving psychomotor objectives
- Any simple or complex skill becomes easy to understand
- Only the attention of the learners is invited towards the activity demonstrated. They are not free to discuss about it
- Participants can pay their attention and follow along with the learning process.

**Disadvantages of demonstration as a method of training**

- There is danger of participants being dishonest when trainer has to play the main role in the discussion and demonstration of the topic.
- There is a risk of too many participants being involved and a potential shortage of time, resources and facility space, which limits the hands-on opportunities of the participants.
- Some participants may feel left behind when others advance at a faster rate, which decreases participant morale in the classroom.
- Trainers may be tempted to lecture rather than to demonstrate.
- Participants are not allowed to ask questions or start discussions during the demonstration.
- Only technical and training skills can be taught this way.
- Trainers may also not be able to assist all participants due to time and space limitations, which is also considered a disadvantage.
- Oral discussion may not be encouraged, since it will go to restrict the demonstration experiment.

**Steps involved in a Successful Demonstration**

1. **Identify audience for work skills demonstration**

    - Identify characteristics of audience to customize demonstration as per their needs
    - Confirm numbers and, if possible, names of individuals to ensure that all are present
    - Identify purpose of the demonstration
      Purpose: To training the audience, to generate awareness, to demonstrate competence, etc.
    - Identify time allowed for demonstration
    - Identify location and facilities where demonstration will take place

2. **Prepare for Work-Skills Demonstrations**

- Identify topic/s for demonstration
- Research topic/s and clarify doubts with subject matter expert
- Develop order or sequence of demonstration, for overall coverage of topic/s as well as coverage of each task within the topic to ensure ease of understanding for audience and efficient use of resources
- Rehearse the demonstration without the audience and identify areas that need specific attention
- Confirm all materials, tools and equipment is present and in working order, including safety equipment for the demonstration

3. **Delivery of Work Skills Training /Conduct demonstration**

- Conduct a site and safety briefing
- Conduct a group introduction session for names and stories of participants
- Clarify the planning of sessions for the audience
- Clarify each activity with respect to purpose, precautions and procedure before performing it
- Conduct the demonstration while adapting to audience needs and ensuring that the purpose of the demonstration is being achieved
- Ensure that all audience members can see the demonstration and hear the instructions and explanations clearly
- Perform all the steps of the demonstration skillfully and in proper sequence
- Ensure that the demonstration is accurate and realistic.
- Provide opportunity for each learner to practice each step in the task or procedure required to be learnt, immediately after the demonstration.
- Provide opportunities for participants to correct mistakes during practice.
- Ensure steps are taken to protect the participant as he or she performs each step of the procedure from hazards.
- Conduct review and summarization of activities as required
- Work safely at all times, complying with health and safety, environmental and other relevant regulations and guidelines
- Collect feed-back that will benefit future demonstration planning.
- Ensure that the equipment and tools are secure after the demonstration in accordance with appropriate procedures.

4. **Undertake post Demonstration activities**

- Collect feed-back information and address any issues identified
- Use feed-back in future demonstration planning
- Secure equipment and tools in safe places and leave them in good condition in accordance with procedures
- Complete demonstration records accurately and submit or process and in the required timeframes

## 5. Assessment of Workplace Performance

- Identify performance criteria or indicators that are to be used as benchmarks for assessment.
- Identify assessment methods and assessment tools to evaluate learners while they work on-the-job or in a simulated environment.
- Develop a checklist for the conduct of the assessment.
- Arrange identified material and physical resource requirements according to assessment specification.
- Conduct an audit of the assessment site.
- Carry out assessment in between the training modules applying the principles of assessment and rules of evidence.
- Collect evidence of performance for each competency based on the rules of evidence.
- Evaluate the collected evidence to check whether it reflects the evidence required to demonstrate the competence.
- Use judgment to conclude whether competence has been demonstrated, based on the available evidence and in line with the agreed assessment procedures and plan.
- Record the assessment decision accurately with respect to the competency mentioned in the assessment criteria being achieved or not.
- Identify areas of improvement in the performance of each learner.
- Share feedback on learner performance with management as per organizational procedure and to the learner to support his/her continuous learning and development.

# MODULE XVI: TRAINING EVALUATION

**Learning Objectives of the Module**

**At the end of this module, the trainee will be able to:**

- Understand importance of Training evaluation
- Learn different Ways to Evaluate Training Effectiveness

1. **Why Evaluation Matters?**

   Evaluations may help:

   - Measure results of the training
   - Measure the trainer's effectiveness
   - Monitor learner progress in terms of skill and knowledge against program and session objectives
   - Create development plan for further learning
   - Measure the actual application of training to the job
   - Evaluate level of competence
   - Evaluate learning retention
   - Assess learning styles
   - Assess learning styles and soft skills of Learners
   - Identify learner learning needs against required curriculum
   - Provide feedback to learners on progress
   - Measure the effectiveness of the design of the course

2. **Ways to Evaluate Training Effectiveness**

   - Feedback Survey
   - Commitment Sheet
   - Skills Assessment
   - Success Case

3. **Levels of Evaluation**

   There are four standard levels of evaluation

   - Trainee reactions to the training
   - Trainee learning
   - Trainee on-the-job behavioral changes
   - Results of the training for the organization

| Donald Kirkpatrick's (1975) 4 Levels of Evaluation | | |
|---|---|---|
| **Level** | **Measures** | **Key Methodologies** |
| 1. Reaction | Satisfaction | • Course evaluation sheet<br>• Questionnaires<br>• Learners' comment |
| 2. Learning | Knowledge, skills, attitudes | • Pre-test and post test<br>• Observations<br>• Self-assessment |
| 3. Behaviours | Transfer of learning | • Assessment<br>• Observations |
| 4. Results | Impact | • Job performance measurements<br>• Focus group<br>• Structured interview<br>• Questionnaires |

## MODULE XVII: COMPETENCY BASED ASSESSMENT

### Learning Objectives of the Module

At the end of this module, the trainee will be able to:

**Introduction to Competency based Assessment**

- Explain the purpose of formative assessment and when is it undertaken.
- Explain how competency-based assessment differs from other types of assessment.
- State the range of assessment purposes and assessment contexts, including Recognition of Prior Learning (RPL).
- Explain the principles of assessment
- Explain rules of evidence
- State the distinction between assessment methods and assessment instruments/tools.
- Describe different assessment methods, including their suitability for gathering various types of evidence, their suitability for the content of units, and resource requirements and associated costs.
- Describe instruments to be used for gathering evidence, such as profile of acceptable performance measures; templates and proformas; specific questions or activities; evidence and observation checklists; checklists for evaluating work samples; candidate self-assessment materials; etc.
- Describe procedures, information and instructions for the assessor and candidate relating to the use of assessment instruments and assessment conditions.
- Explain the purpose and process of making reasonable adjustments and when they are applicable.

**Prepare for Assessment of Competence**

- Schedule assessments in between the training schedule as per requirement of the training plan.
- Identify units of competency that are to be used as benchmarks for assessment.
- Identify assessment methods and assessment tools to evaluate the knowledge and domain skills of a learner.
- Develop a checklist for the conduct of an assessment.
- Arrange identified material and physical resource requirements according to assessment specification.
- Conduct an audit of the assessment site.

**Conduct Assessment of Competence**

- Carry out assessment in between the training modules applying the
- principles of assessment and rules of evidence.
- Collect evidence of performance for each competency based on the rules of evidence.
- Evaluate the collected evidence to check whether it reflects the evidence required to demonstrate the competence.
- Use judgement to conclude whether competence has been demonstrated, based on the available evidence and in line with the agreed assessment procedures and plan.
- Use technology while conducting assessment activities such as video evidence of skills/performance, recording of oral evidence, computerbased/ on-line testing; etc.
- Check and authenticate the video recordings and other evidences to see if there are no shortcomings, else retake the recording and evidences.
- Record the assessment decision accurately with respect to the competency mentioned in the assessment criteria being achieved or not.
- Document the results on paper templates as well as online forms and templates as prescribed accurately.
- Complete candidate records accurately in the required time frame.
- Secure, label and pack the evidences accurately as per standard procedures adopted by the training organisation.
- Provide clear and constructive feedback to the participant regarding the assessment decision.
- Develop a development plan for the learner based on formative assessment results.

**Assessment of Workplace Performance**

- Identify performance criteria or indicators that are to be used as benchmarks for assessment.
- Identify assessment methods and assessment tools to evaluate learners while they work on-the-job or in a simulated environment.
- Develop a checklist for the conduct of the assessment.
- Arrange identified material and physical resource requirements according to assessment specification.
- Conduct an audit of the assessment site.
- Carry out assessment in between the training modules applying the principles of assessment and rules of evidence.
- Collect evidence of performance for each competency based on the rules of evidence.
- Evaluate the collected evidence to check whether it reflects the evidence required to demonstrate the competence.
- Use judgement to conclude whether competence has been demonstrated, based on the available evidence and in line with the agreed assessment procedures and plan.
- Record the assessment decision accurately with respect to the competency mentioned in the assessment criteria being achieved or not.
- Identify areas of improvement in the performance of each learner.
- Share feedback on learner performance with management as per organizational procedure and to the learner to support his/her continuous learning and development.

## 1. Defining Assessment

Assessment is a systematic method of gathering data under standardized conditions and reaching a conclusion regarding the knowledge, qualification and potential of an assessed. Assessment can be broadly divided into two categories.

**Formative Assessment:** Formative assessment refers to a variety of assessment procedures that provides the required information, to adjust training, during the learning process.
The formative assessment (FA) is conducted during the learning process. It is a continuous process that observes participant's needs and progress, in the learning process. It aims at enhancing and monitoring participant learning.
**Summative Assessment:** Summative assessment is defined as a standard for evaluating learning of participants. The summative assessment (SA) is undertaken only at the end of the course or unit.
It aims at learners' competency and evaluates his learning. As an assessor you will be doing summative assessment.

## 2. Introduction to Competency Based Assessment

Competency Based Assessment is a process where the assessor observes the assesse for evidence of competence to be compared with the benchmarks. It is a system of using a variety of assessment methods to assess candidate's current ability and compare it to a set of competency standards.

## 3. Characteristics of Competency Based Assessments

- Competency Based Assessments are criterion based: Assessment is done based on a number of criteria compared with benchmark to establish candidate's competency

- Competency Based Assessments are evidence based: Competency based assessments are not based on subjective evaluation and are instead based on observable factors. The evidence based nature of these assessments ensures that the results do not vary a lot with a change in assessors.

- Competency Based Assessments are participatory: Rather than just taking a test, participants are involved with the assessor in the competency based assessments.

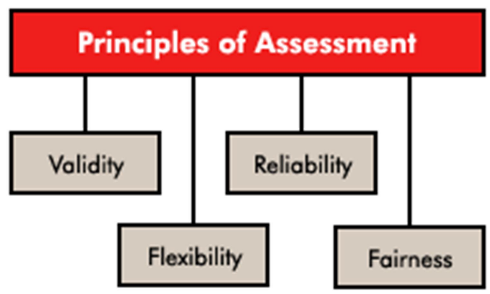
**4. Purpose of Competency Based Assessments**

- Give the trainee a nationally recognized qualification
- Contribute to the objective approach of developing the skills of candidates and identifying competencies that need to be worked on
- Reduce personal bias in the evaluation process
- Focus on progressive skill development for the candidates to bridge the gap from where they are to where they need to be focus on developing a detailed national criterion based on the needs of different industries and different job profiles.

**5. Principles of assessment**

There are four principles of assessment:

- Fairness
- Flexibility
- Validity
- Reliability




**Fairness**

The assessment system must be transparent. Trainee/candidates shall be aware of how they will be assessed, when and by whom, what the National Standards are and what they will be assessed against.

**Flexibility**

The assessment system shall be flexible enough not to disadvantage trainee/candidates on grounds of:

- Physical or intellectual disability;
- Socio-economic background;
- Religion;
- Ethnicity;
- Gender;
- Age.

This shall involve making reasonable adjustments to assessment techniques for individual trainee/candidates. Trainee/candidates still supply the same evidence of competence, but it may be gathered in different ways.

**Validity**

A competency based assessment system must be based upon clear benchmarks. For an assessment to be valid, the assessment methods and the resources has to reflect the skills, knowledge, attitude and the standard of performance as benchmarked by the National Occupational Standards.

**Reliability**

The assessment outcomes should be consistent and accurate. That is, the assessment could provide similar outcomes for trainee/candidates with equal competence at different times or places, regardless of the assessor conducting the assessment.

Apart from above principles assessment must be cost effective for both the institutions and for trainee/candidates. Costs to be considered include:

- Materials for assessments;
- Assessor's fees;
- Fees for the assessment center including any calculated overhead;
- Remuneration to support staff, if any;
- Trainee/candidate's time;
- Assessor's time;
- Time taken to reach an assessment decision.

## 6. Rules of evidence

There are four rules of evidence:

- Validity
- Sufficiency
- Authenticity
- Currency

**Validity**

The evidence collected must be valid. For an evidence to be valid, the evidence has to reflect the skills, knowledge, attitude and the standard of performance as benchmarked by the National Occupational Standards.

In reviewing evidence, assessors should consider the following questions:

- Does the evidence relate to the unit of competency?
- Does the evidence reflect the different dimensions of competency?
- Does the evidence address the key competencies?

**Sufficiency**

Assessors must collect sufficient evidence of competence from trainee/candidates so that the assessors can reach an assessment decision. Sufficiency shall be defined as collecting enough evidence to determine that the trainee/candidate can:

- Perform task skills;
- Perform task management skills;
- Perform contingency management skills;
- Perform according to specific workplace environments.

In reviewing evidence, assessors should consider the following questions:

- Does the evidence cover the full range of performance identified in the unit of competency?
- Does the evidence show competence over a period of time?
- Does the evidence show competence in different contexts?

**Authenticity**

Authenticity means that the evidence provided for assessment is really the work of the trainee/candidate.

In reviewing evidence, assessors should consider the following questions:

- Is the evidence the candidate's own work?
- Are the qualifications, references and licenses presented by the candidate authentic documents?

**Currency**

Currency means that the evidence presented for assessment is most recent. In reviewing evidence, assessors should consider the following questions:

- Does the evidence show that the candidate can currently perform the competency while working?
- Is the evidence benchmarked against the current version of the industry competency standards?

**7. Process of competency based assessment**

There are five steps for competency based assessment:

- Prepare (plan and organize) for assessment of competence
- Conduct assessment of competence (of vocational skills, knowledge and understanding as per set standards of performance)
- Undertake post assessment activities

**Prepare (plan and organize) for Assessment of Competence**

- Schedule assessments in between the training schedule as per requirement of the training plan.
- Identify the standards/criteria to be used for assessment
- Read and interpret the assessment strategy
- Review and identify details of the assessment job like list of candidate s who

have to be assessed, location/venue, date/time/duration of assessment, contact person and contact details, standards on which assessment has to be conducted, assessment tools and methods required for to be taken along for employing during assessment, types and sufficiency of evidence required (of performance in the work environment, of knowledge and/or understanding); location and resources required for the assessment; specific learner needs and any support required

- Plan how to manage the assessment process and how to record assessment processes and decisions
- Check contact venue, materials, physical resources and other details of the assessment are in place and report any discrepancy to relevant personnel
- Amend assessment plan if required in discussion with instructional design and co- ordination team
- Review assessment tools and instruments to check what is the evidence requirements and assessment criteria
- Ensure tools and equipment required for observing and recording evidence is in order
- Reach venue for the assessment at appropriate date, time with relevant materials, questionnaires tools, recorders etc.
- Develop a checklist for the conduct of an assessment.
- Conduct an audit of the assessment site.

**Conduct assessment of Competence (as per set standards of performance)**

- Communicate the purpose, requirements and processes of assessment to learners
- Instruct the candidates at the start of the assessment regarding duration of the assessment, rules to be followed, entire process and penalties for breaking of the rules
- Mark attendance as per the standard practice
- Gather required documents from learners
- Manage assessments of vocational skills, knowledge and understanding to meet assessment requirements
- Follow procedures for the confidentiality of assessment information
- Carry out assessment in between the training modules applying the principles of assessment and rules of evidence.
- Collect evidence of performance for each competency based on the rules of evidence.
- Evaluate the collected evidence to check whether it reflects the evidence required to demonstrate the competence.
- Use judgment to conclude whether competence has been demonstrated, based on the available evidence and in line with the agreed assessment procedures and plan.
- Use technology while conducting assessment activities such as video evidence of skills/performance, recording of oral evidence, computer based/ on-line testing; etc.
- Check and authenticate the video recordings and other evidences to see if there are no shortcomings, else retake the recording and evidences.
- Record the assessment decision accurately with respect to the competency mentioned in the assessment criteria being achieved or not.
- Document the results on paper templates as well as online forms and templates as prescribed accurately.
- Complete candidate records accurately in the required time frame.
- Secure, label and pack the evidences accurately as per standard procedures adopted

by the training organization.
- Provide clear and constructive feedback to the participant regarding the assessment decision.
- Develop a development plan for the learner based on formative assessment results

**Undertake post assessment activities**

- Monitor the cleanliness and tidiness of the assessment area
- Notify any special housekeeping requirements, maintenance requirements or training equipment repair requirements to appropriate personnel
- Secure the equipment and tools used during assessment while ensuring that they are in good condition

And lastly, it would be interesting to know how even the most seasoned assessors sometimes fall into the trap of common biases. Some of those biases are:

- **The hallow effect:** In this case, one or two characteristics decide the entire perception abut a person. So, it might be a good behavior displayed during one assessment exercise or a negative behavior displayed which may then keep influencing other assessments as well.
- **Contrast Errors:** It happens so when assessor starts contrasting the performance of one assesse with another instead of referring to the competencies and defined performance criteria.
- **Recency Bias:** The assessor considers the most recent performance to rate the assesse.
- **Leniency and Severity Bias:** This happens when the assessor refrains from objectively evaluating and giving an honest rating and instead gets generous in scoring. Severity is exactly opposite, where the assessor restrains from scoring a behavior displayed as highly effective despite of concrete examples.

## 8. Assessment of Workplace Performance

The performance evaluation is a review based upon an individual's job performance and assigned duties. A supervisor typically looks at an employee's skills and accomplishments during a specific time period and tracks whether the employee has lived up to expectations, exceeded them or failed to meet desired results.

Ideally, performance evaluations provide a stepping-stone for the employee and supervisor to identify and discuss areas where performance can be improved. It can also be an important opportunity for employee and manager expectations to be reinforced or clarified

Evaluations are often seen as documentation of past performance. Some businesses are even using them as a vehicle for reviewing employee development. Completed properly, they can lead to an improved understanding of personal and professional goals. This approach can also help ensure employees are recognized for their work and are being provided the right training opportunities to acquire further skills, which can be beneficial for both the employee and the business.

For working professionals, review processes can come in all varieties, with direct supervisors or upper-level managers involved. Sometimes, other co-workers can be added into the process, and they can give management a peer-review of the employee. Overall, the review process can be broken down into four different methods.

- **Top-down Review:** This approach puts the direct supervisor in charge of the process, although business unit managers or executives can also be involved. The direct supervisor's involvement is important given their working relationship with employees, often making him or her more knowledgeable on assessments and feedback.
- **Peer Review:** In this case, employees are evaluated by other co-workers. The benefit with this type of review is that co-workers at the same level of the employee may understand the job, its challenges and how it's being performed on a day-to-day basis better than higher-level management. However, there may be a risk with this type of method, as work rivalries and jealousy can cause some co-workers to review others more critically, particularly if they are in competition for a raise or promotion
- **The 360-Degree Review:** This process solicits reviews from all perspectives – superiors, peers, subordinates and sometimes even customers. Typically overseen by the HR department, these reviews are often done anonymously. The risk with the 360-degree review is that anonymous input can lead to excessive negative criticism and be counterproductive for the employee.
- **Self-Assessment:** Allowing employees to assess their own performance can also be a beneficial review method. Not only can this provide a clue to managers as to some areas where employees feel they can improve and expand, but it may make it easier for employees to accept constructive criticism from managers. However, if employees and managers diverge substantially in their performance reviews and perspectives, this process can present challenges.

**Steps for Assessment of Workplace Performance**

- Identify performance criteria or indicators that are to be used as benchmarks for assessment.
- Identify assessment methods and assessment tools to evaluate learners while they work on-the-job or in a simulated environment.
- Develop a checklist for the conduct of the assessment.
- Arrange identified material and physical resource requirements according to assessment specification.
- Conduct an audit of the assessment site.
- Carry out assessment in between the training modules applying the principles of assessment and rules of evidence.
- Collect evidence of performance for each competency based on the rules of evidence.
- Evaluate the collected evidence to check whether it reflects the evidence required to demonstrate the competence.
- Use judgement to conclude whether competence has been demonstrated, based on the available evidence and in line with the agreed assessment procedures and plan.
- Record the assessment decision accurately with respect to the competency mentioned in the assessment criteria being achieved or not.
- Identify areas of improvement in the performance of each learner.
- Share feedback on learner performance with management as per organizational procedure and to the learner to support his/her continuous learning and development.

## 9. Assessment methods and tools

The different types of assessment methods used during assessment are:

**Direct observation**

- Real work/real time activities at the workplace
- Work activities in a simulated workplace environment

**Structured activities**

- Simulation exercises and role-plays
- Projects
- Presentations
- Activity/job sheets

**Questioning**

- Written questions
- Interviews
- Self-assessment
- Verbal questioning
- Questionnaires
- Oral or written examinations

**Portfolios of evidence**

- Collection of work samples compiled by candidate
- Product with supporting documentation
- Historical evidence
- Journal or log book
- Information about life experience

**Review of products**

- Testimonials and reports from employers and supervisors
- Evidence of training
- Authenticated prior achievements
- Interview with employer, supervisor, or peer

**Observation** allows a chance to view the learner's skills and knowledge and allows recording the authentic video evidence of the learner demonstrating their understanding verbally/physically.

The drawback of this method would be the need to supplement the observation with additional evidence which can be time consuming. The nature of observation and subsequent need to link the evidence to a witness testimony eg. Written/ witness authentication is essential for audit trail as well as assessors own clarification to their peers/organization.

**Work Product** is a useful way to assess at the end of a project in a summative grade. The finished product eg. A mushroom produced or honey collected, can provide the assessor with evidence/culmination of a learners understanding of the unit.

The end product can be difficult to assess in and of itself so an accompanying pre-production/ making of portfolio is often necessary to contextualize and evidence individual learners contribution (particularly in group tasks) whilst showing the process. This can be time-consuming on the learner and the Assessor if not prepared correctly with clear, well-defined bench-marks for the project at each key stage of the production.

**Structured Interviews** are another popular method which are open ended questions asked to the candidate which help explore a particular job related competency better. It happens by asking very specific questions regarding a past performance, cited as example for a competency by the candidate and the observer tries to establish the competency by asking questions about it.
The list of questions can be long but the observer has to essentially bring out the fact that if a competency or behavior is displayed, there is a well-defined intent behind it as well.

**Role Play-** Using role play in simulation exercises reveals a great deal of information regarding the behaviors. The role play may have a little situation described which is given to the participant and similar information is provided to the observer however the observers are provided with certain leading questions which help to elicit the behaviors to be observed. It is also a good idea to video record the role play which can be played later during washouts with other observers to clearly identify specific behaviors. In some conservative organizations, instead of role plays verbatim are written which also serve the similar purpose of recording the behaviors for later reference.

**Case Study-** A case studies for the assessment sake can be defined as detailed information regarding the different aspects of an organization, person or situation depending upon the competencies to be judged and has some problem themes running through it. The candidate is required to carefully analyze various relevant aspects of the problems and issues and reach a conclusion regarding the same with a logical reason to support his/her decisions

**Simulation** can provide invaluable practice of work place situations that the learner will need to learn in a safe and patient environment before progressing to a real work place scenario. The stakes can be high but the margin for error allows the breathing space and understanding necessary to learn practical skills in the context they are being trained for.

The key drawback to this can be learners having a limited inauthentic experience of the full realistic scenario they are being trained for and may therefore not take the situation as seriously.

**Witness testimony** is an invaluable way of capturing evidence of learners engaged in practical tasks and can be evidenced with video of the learner using skills and reflecting on their practice. This needs to be coupled with written/ witness authentication cross-referenced with the criteria the activity is addressing.

A drawback is the amount of work needed (statements/ videos etc.) to prove the learners understanding. The subsequent difficulty in standardizing the assessment evidence can be troublesome as different learners may struggle to demonstrate verbally that they understand the task.

**Projects** provide great ways to set the assessment in a professional/ vocational context while allowing the learners to gain work experience in their field. The beginning, middle, end structure of the assessment provides clear stages for formative feedback, reflection, and a chance to develop team-work skills.

It is important to recognize the learner's prior learning/ occupational performance so as to differentiate tasks and ensure that every one is engaged at all stages of the project.

**Written** provides a learner with a chance to convey understanding in text format. This is a traditional form of assessment that many learners will be familiar with and is a comfortable way to demonstrate learning. This provides clear knowledge based evidence that can be easily mapped across to criteria.

Learners with dyslexia and other difficulties can struggle with written tasks so it is important to break Assignments in to small chunks and offer guidance with regards to structure and shaping of a Report.

**Audio** is a useful and time-efficient way to store and record feedback of a participant's work that can be played back on headphones as the participant looks back over and reflects on their work.

**Video** is a useful way to speak to the learner in a personal way down the lens that engages and focuses the learner on the targets at hand. The Assessor can be direct, specific, detailed, and thorough by replicating the 1-1 feedback in class in a way that can be saved, reviewed, revisited, paused and used whenever it suits the learner.

**Psychometric assessments/Aptitude Tests** are another popular method for not just assessing the competencies but also understanding the strengths, personality types and motivation of the candidates. There are psychometric tests which measure specific competencies like teamwork, sales orientation, emotional quotient etc. Cognitive ability tests provide great information regarding the aspects like conceptual problem solving, business and financial acumen etc.

10. **Tools and Equipments used in Assessmen**t
    - Recorders and speakers
    - Cameras and video camera
    - Flip charts with markers
    - Templates and proformas
    - Specific questions or activities
    - Evidence and observation checklists

- Checklists for evaluating work samples
- Candidate self-assessment materials
- Whiteboard and whiteboard markers
- Question paper (In hard copy or soft copy)
- Other tools and equipments

**11. Assessment tools are used to:**

- Collect and review learner feedback.
- Distribute feedback forms to learners and encourage learners to complete them without undue influence
- Collect and review feedback forms to identify any implications for own practice
- Summarise the feedback and transmit all forms and the summary to supervisor / evaluation or instructional design team
- Maintain learner confidentiality according policies and procedures.
- Evaluate own planning and delivery skills

**12. Giving Feedback**

Providing participants with feedback during the course of a training programme is an important way of reinforcing learning and correcting misunderstandings, but remember:

- Must be specific
- Timely
- Don't publicly humiliate
- Constructive

**13. How do we go about?**

Giving feedback can be done through verbal and non-verbal means:

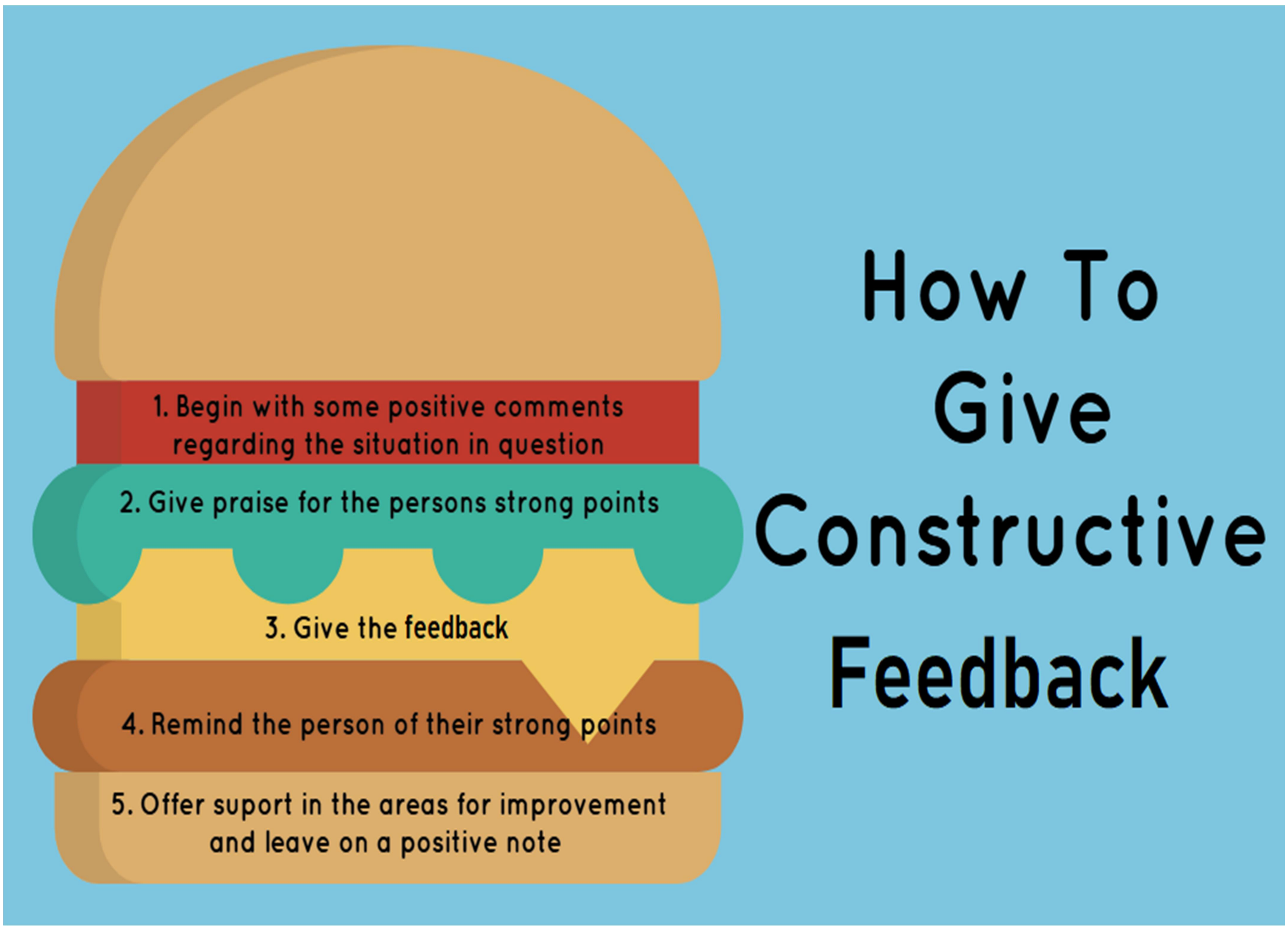
a. Supporting an idea made by a group member
b. Praise
c. Written information on assessment papers
d. Smiles
e. Eye contact

**14. Constructive Feedback**

Constructive feedback is providing useful comments and suggestions that contribute to a positive outcome, a better process or improved behaviors. It provides encouragement, support, corrective measures and direction to the person receiving it.
Constructive feedback can be positive (letting someone know they're doing well), negative (letting people know about ways in which things could be improved), or neutral (just an objective observation).

There are two main elements that make feedback constructive;

1. The content of the feedback: Constructive feedback is specific, issue-focused (rather than a value judgment about the individual) and based on what is observable (rather than assuming anything about the person's attitude or motivation). It also includes some specific direction on how to make improvements (where needed).
2. How the feedback is delivered: To be constructive, feedback should not be delivered in a way that provokes hurt feelings, shame, defensiveness, resistance or a sense of failure. Honest does not mean tactless.



## Online assessment methods and their application

A variety of methods may be used online to assess learners in the following areas:

- Critical thinking (essays, reports, reflective journals)
- Problem solving (multimedia or text-based scenarios, simulations using CD-ROM, videoconferencing)
- Demonstrating techniques (videoconferencing, verification by workplace mentor, site monitor)
- Self-management (journal, autobiography, portfolio, learning contract)
- Information access/management (database development, bibliography, problem solving)
- Demonstrating knowledge (written exam with local proctors, quick feedback through multiple choice, true/false matching, short answer tests)
- Designing, creating (portfolios, projects using video or the Web)
- Communicating (debate, role play, PowerPoint presentation, report journal, essay)
- Teamwork and collaboration (e-mail, listserv, or conferencing discussions/debates)

Few other method of online assessment can be:

**1. Task-Based Simulations**

Simulations test practical and experiential knowledge. Online learners must use all of their resources and skills to complete the task in a safe virtual environment. Thus, you can assess proficiency without taking any real world risks. The simulation must be as realistic as possible to obtain accurate results. This includes background sounds, relevant images, and immersive eLearning characters. If the task requires software or equipment, these tools should also be involved. You need to be able to mimic every aspect of the eLearning experience so that you can assess their performance in context. For example, how they would perform under pressure.

**2. Branching Scenarios**

Branching scenarios involve multiple decision points that lead online learners down different paths. Every choice brings them one step closer to the outcome, which highlights the negative or positive repercussions of their actions. They must utilize their skills and talents to navigate the situation and overcome common obstacles. Since there are many branches involved, it's wise to create a detailed eLearning storyboard beforehand. This allows you to keep track of all the decision paths and maintain consistency.

**3. Online Group Collaboration Projects With Feedback**

You can also use peer-based eLearning feedback to gather qualitative data. Ask your online learners to divide into groups and assign them a topic or prompt. They must work together to solve the problem or create a finished product, such as an online presentation or eLearning video. What sets this apart from other online group collaboration projects is the peer observations. Provide online learners with a checklist or questionnaire they must complete during the eLearning assignment. Encourage them to assess the performance of their peers.

- Is there a specific group member who stood out?
- What were their strengths and areas for improvement?

To ensure that everything goes smoothly, develop group guidelines in advance and let them know they're being assessed.

**4. Open-Ended Questions**

Open-ended questions are one of the most simple and straightforward qualitative eLearning assessment methods. However, they also allow for the most creative freedom. There are no right or wrong answers. Instead, online learners must reflect on the topic and draw their own conclusions. They may even discover that their current assumptions or beliefs are holding them back. The only caveat is that open-ended questions are challenging to grade. However, you can develop a rubric in advance to streamline the process and compile accurate data.

**5. Problem-Solving Case Studies**

Problem-solving, as a qualitative eLearning assessment technique, turns online learners into detectives so that they can solve the problem and display their knowledge. It all starts with a case study or real world example. Remove the ending to leave it on a cliffhanger, then ask online learners to brainstorm solutions. They must also explain how they arrived at the conclusion and why they feel it’s the best approach. It's not about the solution, itself, but the thought process. Which skills did they use in their strategy? How did they put their knowledge into action?

**6. eLearning Blogs**

Encourage your online learners to set up an eLearning blog and post on a daily or weekly basis. Develop a posting schedule that includes prompts or questions, minimum word count, and upload deadlines. Review the blogs periodically to assess online learner progress and identify areas for improvement. There are a variety of free blogging platforms to choose from. Thus, you should to set some ground rules and provide a list of suitable tools. You can also create online tutorials or walkthroughs for new bloggers to minimize the learning curve.

**7. Online Interviews**

Face-to-face interviews aren't possible in eLearning environments. However, you can still conduct interviews with the help of Video Conferencing tools. This is usually more feasible for smaller groups or one-on-one mentoring. Prepare a list of questions and schedule an online interview for each online learner. Offer online learners the opportunity to address their concerns and provide eLearning feedback. For example, encourage them to identify their strengths and weaknesses, then recommend supplemental eLearning resources. In lieu of online interviews, host live webinars where online learners can interact with their peers and discuss the topic. You can even ask questions directly to see who knows their stuff and who needs to refresh their knowledge.

**8. Forums And Online Discussions**

eLearning forums give online learners the ability to share ideas, explore topics, and improve their comprehension. Meaningful online discussions naturally occur and learners reveal their level of understanding. Online instructors and facilitators even have the power to guide the online discussion by posting prompts and thought provoking questions. For example, asking online learners about the decisions they made during an eLearning scenario. Their explanations reveal why they made the choices they did and what they'd do differently in the future. The most effective way to assess qualitative knowledge in eLearning forums is careful monitoring. Make a note of online learners who participate frequently and those who sit on the side lines. You also have the option to conduct online learner surveys after the fact to get their input.

Qualitative eLearning assessments measure the level of comprehension so that you can create personalized eLearning experiences. This also allows to intervene and offer supplemental resources for online learners who are struggling.

# MODULE XVIII: CONTINOUS PROFESSIONAL DEVELOPMENT

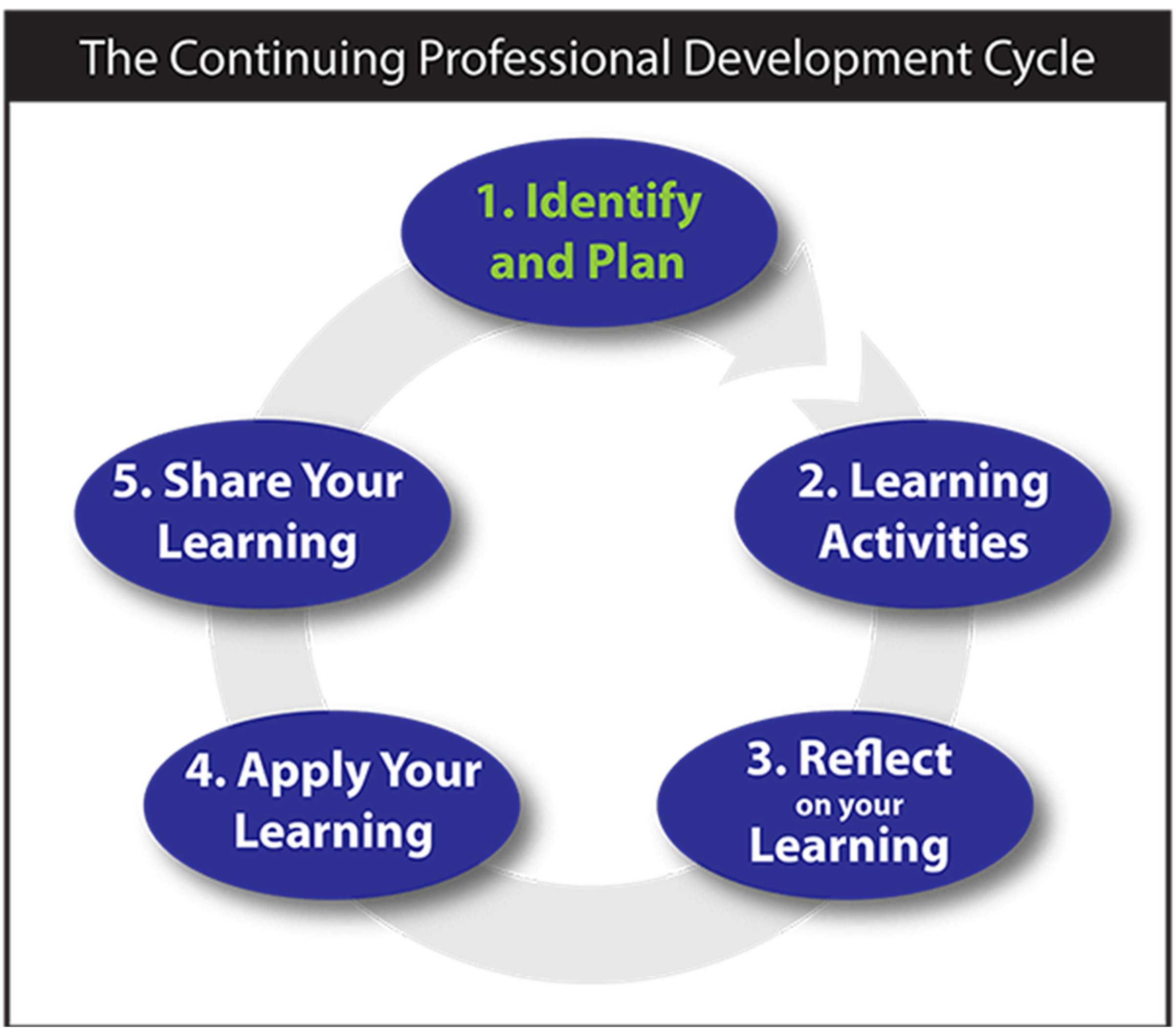
**Learning Objectives of the Module**

**At the end of this module, the trainee will be able to:**

- Explain the importance of continuous professional development for trainers
- Develop year-on-year personal and professional goals and objectives.
- Evaluate one's own capacity to meet these goals and objectives.
- Identify techniques for continuous professional development.
- Develop a professional development plan to enhance professional capabilities.

Continuing professional development, or CPD, is the ongoing process of developing, maintaining and documenting your professional skills.
These skills may be gained formally, through courses or training, or informally, on the job or by watching others.

The process of CPD is designed to help you identify and act on your own development needs.
The Continuous Professional Development Cycle (see figure) shows that professional development is, like much other learning, best thought of as a circular series of activities. The process moves from identifying your development needs through planning and then carrying out your learning activities, to reflecting on your learning, and then applying it and sharing it with others.



Perhaps the most important thing about CPD is that it is personal.
Each individual is expected to identify their own needs, organize their own training, and learn for themselves. Part of being a professional is taking responsibility for your own skills and recognizing when they need to improve.

**1. Identifying Your Needs**

There are a number of ways in which you can identify development needs.
For example, you can carry out a skills audit or by doing the SWOT analysis. You may receive feedback from colleagues or your line manager about an area in which you are weaker. Alternatively, you may have an interest in a particular area and want to develop your knowledge.
You may find our page on Identifying Areas for Development helpful here.
Once you have identified your key areas for development, you then need to plan your activities.

**2. Planning and Carrying Out Development Activities**

Development activities may be either:

- Formal, such as training courses or particular qualifications.
- Informal learning, including side-by-side learning, video training, shadowing, mentoring, coaching or reading on the subject.

**3. Reflecting on Your Learning**

Reflecting on what you have learned is a vital part of continuing professional development. Learning does not emerge only from activities that you designated as 'development', and you may find that you are learning at least as much from your day-to-day activities. It is a good idea to keep a 'learning log' or diary. Make a habit of writing in it at least once a week, if not each day (if you leave it any longer, you probably won't remember). For each event or activity that you find useful, make a note of:

- The situation;
- What you learned;
- What you will do differently as a result.

This diary can be used to assess your progress against your development goals.

For any formal or informal but designated development activity, you should record the activity, what you found useful or not useful about it, and what you have learned. In each case, make sure that you are clear about how it will change what you do in future (how you apply your learning). You may find our page on Reflective Practice helpful in developing good habits in this area.

**4. Applying Your Learning**

Going on training courses or watching videos is only the start. You then have to apply what you have learned to your own job. This can be quite a clumsy process, especially at first. The competence theory of learning sets out that we move through four stages when we learn:

- Unconscious incompetence – not knowing what we don't know;
- Conscious incompetence – knowing where we need to develop and watching other people do

it, but still unable to do it ourselves with any skill;

- Conscious competence – being able to do something reasonably well, provided we concentrate; and
- Unconscious competence – being able to do something almost instinctively, without needing to focus on it.

When you have done some training or other development activity, you will probably be somewhere between conscious incompetence and conscious competence, depending on how much you have been able to practice.

You therefore need to spend time applying your learning and practicing to move to a stage of unconscious competence.

**5. Sharing Your Learning with Others**

Some commentators add a fifth stage to the competence cycle – being able to teach others. It is certainly true that being able to articulate and share your learning is an important part of making sure that you have fully internalized it.

TOP TIP!

It is a good idea to get into the habit of discussing your learning with your colleagues on a regular basis. Sharing each other's learning can be a really good development tool, and can help you identify new areas for development, or ideas for other development activities, as well as helping to refine what you have learnt in your mind.

**Recording Your Development**

An important part of continuing professional development is being able to demonstrate it.You should therefore keep a folder or portfolio of all your development activities, drawing on your learning diary. The aim of this is to be able to show how your skills and knowledge have developed over a period.

You should therefore:

- Keep a note of your development needs and goals, and make a regular (quarterly, six-monthly or annual) assessment of your progress against them;
- Record any training courses attended, with a copy of any certificates or qualifications obtained. Keep a record of the date, provider, aims of the training, and your thoughts on what you learned from it;
- Make a note of any shadowing, video-assisted training or similar. In each case, record the provider, the aims, and your thoughts about what you learned;
- For any coaching or mentoring sessions, make a note of the date, the person you were with, what you discussed, and what you intend to do differently as a result;
- For any reading and other informal development that you do, make a note of the book or website, and what you have learned and will do differently as a result;
- If you are involved in any critical incidents, or make particular mistakes from which you learn, record the details of the incident, what you learned, and what you will do differently as a result.

And finally…

Continuing professional development is an ongoing process, as well as a cycle. You are likely to continue to learn throughout your professional life.

## Case Study

- ### Case Study-1

Prateek works with KRITASH Enterprises, a pioneer in selling food products. He often has to make presentations to the employees on new products developed. He also meets HR of various corporate companies presenting Kritash's products. Though he is technically very competent, and he makes the presentation prepared by his boss, he finds it difficult to highlight the uniqueness of the products developed. His boss often needs to intervene to convince the sales team to sell the product. Prateek is unable to understand the reason behind his inability to train the employees well. Prateek boss decided to speak to all the employees that Prateek is currently working with to find out their satisfaction level.

The feedback from them served as an eye opener for both the boss as well as Prateek. Almost all of them felt that Prateek was unable to explain the product to them well. Prateek, however, is using the presentation as is exactly been given to him. He greets them and runs them through the slides explaining the content.

Where do you think Prateek was going wrong?

- ### Case Study -2

Suresh, has been working as a trainer with ABC Bakers for the past 2 years. He has conducted various training with their young leaders and knows his products very well. His biggest challenge in conducting the session is to address the problems of each one of them. Also, many a times, he has realised that few of the participants, discuss topics that may be not relevant for all the participants. How can you help Suresh?

- ### Case Study- 3

Abhishek is explaining the how to get loan from the bank for the expansion of the business to the participants. Abhishek realises that the participants are thoroughly confused and cannot understand the process at all. Since they are unable to understand, they are scared and Abhishek can feel a sense of fear in them. As a trainer, he is considering it as his failure.

Can you help Abhishek?

- ### Case Study- 4

It is Christmas time and people are all in a festive mood. As a part of PMKVY sessions, John has to complete an important training on a new module on entrepreneurship. The assessments are scheduled immediately after the Christmas break. John is all geared up to talk about the interesting topic and the way it can improve the overall results. He has spent about 1 week to understand the topic well. However, when he meets all the audience, he realises that they are not very keen on attending the session and are in a hurry to wind up. 2 of the participants are refusing to allow John speak since he is young. What should John do?

- **Case Study- 5**

Manoj is training a group of 30 people in one of the PMKVY sessions. They have gathered to know more about the entrepreneurship development process. As Manoj starts talking, he is constantly interrupted by a few participants who are asking Manoj all unrelated questions.
Manoj is unable to proceed with his discussion. He also realises that it is upsetting other participants and some are enjoying this conversation.
What should Manoj do?

- **Case Study- 6**

Farhan is training a group of 30 people on legal compliances for a business. He has to complete the PMKVY sessions by the end of this week. It is about 9.00 in the morning. The participants are sitting at the training hall and look very excited. Farhan starts showing the presentation to the participants and when he suddenly hears one of the participants speaking on the phone. Farhan continues with his presentation, despite this. After a while he heard the conversation getting louder.
What should Farhan do?

- **Case Study- 7**

How will you handle the following concerns of your participants:-

- Sir, I understood the topic that you just discussed. But I don't know how to speak when someone asks me these questions.
- Madam, you explained everything very nicely. But these things cannot be applied in real life.
- Sir, I am getting a call from my house repeatedly. Can I go and come back in half an hour? I will have to take the call.
- Madam, what if the government changes the rule on this product? What will I do?

- **Case Study- 8**

Suchitra has to make her class interactive. She is conducting a session on `

Entrepreneurship as a way towards financial strengthening'. How will she involve the class in the brainstorming session?

- **Case Study- 9**

Srikant has to train a batch of 30 people on Entrepreneurship. They are all already in successful entrepreneurs and feel that the course content is extremely basic. When in the class, they either seem disinterested or look for reason to miss the training. They are attending the class because of certification.
How do you think Srikant can make the class interesting for the participants?

- **Case Study- 10**

Arvind has to train a batch of 30 participants on leadership skills The participants are highly interested and want to know more than is included in the course content. Arvind wants to tell them more than is required, but organizational policies would not allow him to go beyond the course content.
What should Arvind do to retain the interest of the participants?