ILPO55 Training Material - Instructor Guidelines

Adult Trainer

 Unit 1

Planning, Design and Delivering of Training Activities

ifs Malta
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UNIT 1: Planning, Design and Delivery of Training Activities

Unit Description

This unit looks at the key aspects to the planning, preparation and delivery of training activities. Learners will be introduced to the purpose of training within an organisation; the assessment of training needs together with considerations that need to be taken for training design. This will also include principles for effective preparation of training material to ensure a positive and fruitful training approach, through different instructional methods. This unit will also explore the different approaches to delivery of training methods taking into consideration the needs of the target group and the organisation.

Understanding the purpose of training within an organisation

Training is crucial for organizational development and success, because it is the primary way to expand an organisation's knowledge base. Both employers and employees stand to gain: on the one hand, the employer e will benefit as the employees would become more efficient and productive if trained well and on the other hand, the employees would improve their career prospects and have job satisfaction/improved morale and motivation.

Training is namely given in respect of:

1. New intake of recruits to familiarize them with the organization's mission, vision, rules and regulations and working conditions.

2. Existing employees refresh and enhance their knowledge, while at the same time ensures that employees have a consistent experience and background knowledge.

3. To cope with change for e.g.: new IT equipment

4. Addressing weaknesses, so as to bring all employees to a higher level. Providing the necessary training creates an overall knowledgeable staff with employees who can substitute one another; enhancing flexibility and will become more able to work independently without constant help and supervision from others.

The benefits of training include:

1. Improves employee morale, while at the same time is equipping him/her with job security and job satisfaction, because a trained employee is an asset for the organisation. The more satisfied the employee is; the greater the morale, making the employee more able to drive organizational success. At the same time training enables the company to reduce employee absenteeism and turnover.

2. A well-trained employee will need less of supervision, therefore there will be less wastage of time and efforts. At the same time, training provides efficiency and productivity gains for an organisation. Well trained employees show both quantity and quality performance

3. Errors are likely to occur if the employees lack knowledge and skills required for doing a particular job. The more trained an employee is, the less are the chances of committing accidents in job and the more proficient the employee becomes.

4. The investment in training that a company makes shows the employees they are valued. The training creates a supportive workplace.

Methods of Training

Training is generally imparted in two ways:

1. On the job training- On the job training methods are those which are given to the employees within the actual working scenario. It is what is dubbed 'learning by doing' method. It is a simple and cost-effective training method. Examples of on-job training methods are job-rotation, coaching, temporary promotions, etc.

   On the job training techniques include:

   - Job-centred learning
   - Sitting with Nellie
   - Projects
   - Job instruction manuals
   - Management by objectives
   - Job rotation
   - Delegation
   - Programmed learning

2. Off the job training- Off the job training methods are those in which training is provided away from the actual working place. Examples include workshops, seminars, conferences, etc. Such method is costly and is effective if a large number of employees have to be trained within a short time period.

   Off the job training include:

   - Lectures talks and discussions
   - Case studies
   - Role playing
   - Simulation
   - Computer-based learning
   - Workshops
   - textbooks

In the financial services industry, like any service-oriented firm, training is provided generally by a mix of all techniques mentioned above.

Today banks acknowledge that the effectiveness of their staff determines the effectiveness of their business, and investment in development and training will help to improve performance and therefore is money well spent. However, no training or development can be successful without motivation from the trainee.

The Training Cycle

The Training Cycle begins long before the training program is conducted and continues after the program has been completed.

This cycle is generally split into four stages:

1. Assess and identify whether there is a specific need to conduct training. There are various ways

2. Design the Training

3. Deliver the Training

4. Evaluate the Training

Videos: http://www.gillpayne.com/2014/01/guide-understanding-the-training-cycle/
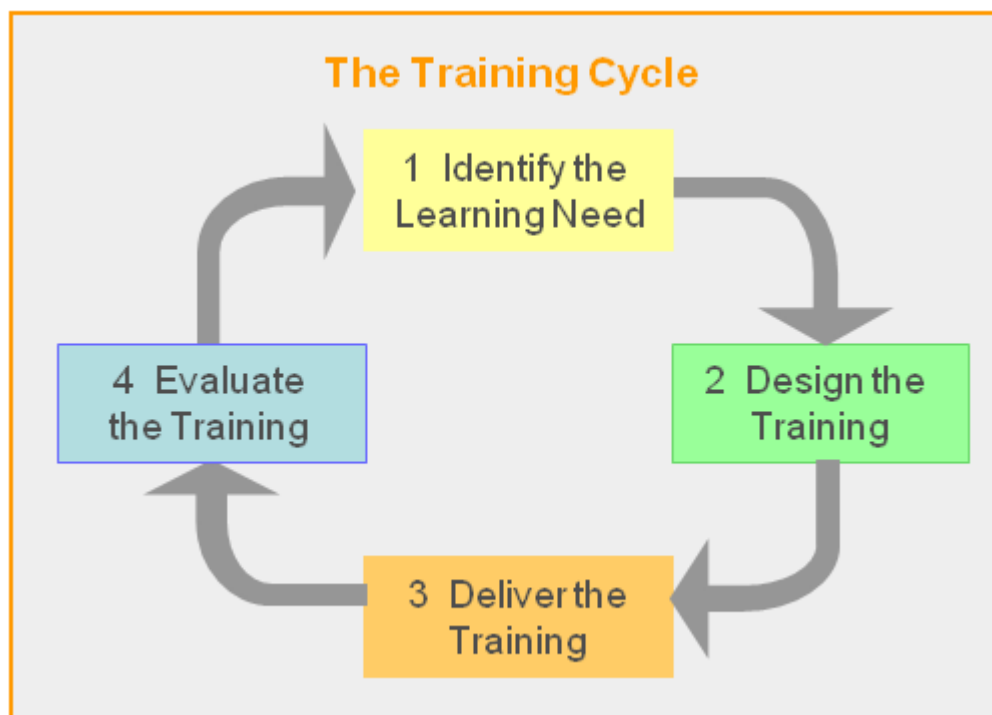
Pre-assessment and methods

The questions that need to be addressed are 'Is the organisation short of particular skills or jobs? Where and in what areas are further skills required?

An analysis of organisational needs is conducted to identify the areas of knowledge or behaviours that training needs to accomplish with learners. The analysis considers what results the organisation needs from the learner, what knowledge and skills the learner presently has and usually concludes with identifying what knowledge and skills the learner must gain. This is generally referred to as the 'performance gap'. At the other end there is also what is referred to as the 'growth gap' i.e. when training is needed for an employee to be promoted or be in a position to fill another open position within the organisation.

Depending on the resources and needs of the institution, a training analysis can take the form of a very detailed inventory of skills, or perhaps at the other end of the spectrum - a general review of performance results.

Conducting a Needs Assessment

Step 1 -- Perform a Gap Analysis

The very first step is to assess the current situation in terms of performance vis a vis existing standards. The idea is to determine the current state of skills, knowledge, and abilities of current and/or future employees. This analysis is carried out on the back of organisational goals, environment, and internal and external constraints.

At this juncture, the question ...what is the desired and necessary state that an organisation should reach must also be addressed

The analysis focuses on the necessary job tasks/standards, as well as the skills, knowledge and abilities needed to reach the ultimate aim. So one must ascertain:

- Which are the critical tasks necessary?
- Are there problems in the organization which might be solved by training?
- Are there problems which do not currently exist but are likely due to changes, such as new processes and equipment, outside competition and/or changes in staffing?
- Could the institution gain a competitive advantage through new technologies, training programs consultants or suppliers?
- How can the organisational strengths be leveraged, instead of reacting to weaknesses?
- What training is needed?

Step 2 -- Identify Priorities and Importance

The training needs identified in step one must be seen in light of the organisational goals, realities and constraints.

These needs must be seen if they are real, worth addressing, and their priority.

Cost-effectiveness: How does the cost of the problem compare to the cost of implementing a solution? In other words, we perform a cost-benefit analysis.

Legal mandates: Are there laws requiring a solution?

Carry out a cost-benefit analysis.

Step 3 -- Identify Causes of Performance Problems and/or Opportunities

1. Are staff doing their jobs effectively?
2. Do they know how to do their jobs?

This will require detailed investigation and analysis of staff, jobs/roles.

Step 4 - Identify Possible Solutions and Growth Opportunities

If staff ARE NOT doing their jobs effectively, then training may be the solution if there is indeed a knowledge problem.

Videos: lecture on Training Needs Analysis:

1. https://www.youtube.com/watch?v=Vvuc9nXPcFY
2. https://www.youtube.com/watch?v=8eYypAULJHE

Understand the importance of planning for training

The process of addressing the gaps in knowledge and skills

- Outline the skills and knowledge required
- Audit of the actual skills
- Comparative analysis of actual with required skills
- Identify the gaps and set a training plan to address the situation
- Skills gaps are mainly driven from job mobility or lack of ongoing training

It is imperative for any organisation to have a skilled workforce. An organisation needs to have in place a project plan to ensure that the existing and new employees have the right skills. Equally important for an organisation is that job responsibilities are clearly defined and updated regularly, when new technologies and processes are introduced. The project plan is to include the current business needs and strategic objectives of the organisation, as well as all the procedures and processes.

The organisation should keep a skills' inventory of the skills and knowledge to perform each role within the organisation. As it can provide a comparative analysis of the tasks and the skills and abilities of employees. A rating linked to the employees' skills and competencies can also be established. An analytic report of the data collected is to be carried out and the final recommendations proposed to the senior management. Training improves employee morale and retention. The list of missing skills and abilities required will assist the organisation in setting up its strategic plan in meeting future challenges and remain competitive in the market.

Recognising prior experience

In the employees' skills gap audit process, the organisation should also review the existing skills and experience held by its employees. Prior experience is about skills and knowledge acquired through work or life experience, either from existing or previous roles, or from tasks performed with other employers. This approach enables the organisation to focus its financial and human training resources on employees with very little or no skills at all and will also help in the training plan for employees.

Writing effective learning outcomes

To understand clearly whether the training provided to the student was effective, we must first define our student learning outcomes. Once defined, then we can assess whether training program was effective. Learning outcomes are the knowledge, skills and attitudes students acquire from a learning experience. Learning outcomes are goals achieved from a learning experience and should not exceed 3-6 outcomes, the most important, as these will have to measured.

Questions asked in order to write an effective learning outcome:

- What do you want the student to be able to do?
- What knowledge, skill or abilities should the ideal student participant demonstrate?
- How will students be able to demonstrate what they learned?
- How does this program and outcome fit within the Organisation's Student Learning Outcomes?

Once the expected outcomes are identified, the formal learning outcome statement is to be drafted. The key requirements to ensure a comprehensive statement of learning outcome are:

- **S**pecific- outcome is focused on a specific category of student learning, as if it is broad, it will be difficult to measure.
- **M**easureable - data can be collected to measure student learning.
- **A**ttainable - outcome is attainable given the educational experience.
- **R**esults-focused - program outcome is aligned with Organisational Student Learning Outcomes.
- **T**ailored - outcome is specifically tail

A helpful and frequently used resource when writing student learning outcomes is Bloom's Taxonomy of Cognitive Skills. The chart below confirms multiple levels of student learning:

Blooms Category	Definition	Action Verb	Teacher's role	Learning Activities
Knowledge Information Gathering	recalling or remembering something without necessarily understanding, using, or changing it	Tell, list, describe, name, repeat, remember, recall, identify, state, select, match, know, locate, report, recognize, observe, choose, who, what, where, when, cite, define, indicate, label, memorize, outline, record, relate,	Directs Tells Shows Examines	Lecture, reading, audio/visual, demonstration, question and answer period, memorize and recite

		reproduce, underline		
Comprehension Deeper Understanding of Knowledge	understanding something that has been communicated without necessarily relating it to anything else	Explain, restate, find, describe, review, relate, define, clarify, illustrate, diagram, outline, summarize, interpret, paraphrase, transform, compare similarities and differences, derive main idea, arrange, convert, defend, discuss, discuss, estimate, extend, generalize, give examples, locate, report, translate	Demonstrates Listens Questions Compares Examines	Discussions, reflection, illustrate main idea,
Apply Use of Knowledge	using a general concept to solve problems in a particular situation; using learned material in new and concrete situations	Apply, practice, employ, solve, use, demonstrate, illustrate, show, report, paint, draw, collect, dramatize, classify, put in order, change, compute, construct, interpret, investigate, manipulate, modify, operate, organize, predict, prepare, produce, schedule, sketch, translate	Shows Facilitates Observes Criticizes	Role plays, case studies, fishbowl activities, construct a model, collection of photographs
Analyse Compare and Contrast	breaking something down into its parts; may focus on identification of parts or analysis of relationships between parts, or recognition of organizational principles	Analyse, dissect, detect, test, deconstruct, discriminate, distinguish, examine, focus, find coherence, survey, compare, contrast, classify, investigate, outline, separate, structure, categorize, solve, diagram, determine evidence and conclusions, appraise, break down, calculate, criticize, debate, experiment, identify, illustrate, infer, inspect, inventory, question, relate, select	Probes Guides Observes Acts as a resource	Practice by doing, simulated job settings, write a commercial to sell a product, make a flow chart, put on a play or skit, write a biography, plan an event
Evaluate Judging the Outcome	judging the value of material or methods as they might be applied in a particular situation; judging with the use of definite criteria	Coordinate, judge, select/choose, decide, debate, evaluate, justify, recommend, verify, monitor, measure, the best way, what worked, what could have been different, what is your opinion, test, appraise, assess, compare, conclude, contrast,	Accepts Lays bare the criteria Harmonizes	Use in real situations, on the job training, create a new product, write a new language code and write in it, persuasively present an idea, devise a way to

		criticize, discriminate, estimate, explain, grade, interpret, rate, relate, revise, score, summarize, support, value		solve a problem, compose a rhythm or put new words to a song
Create Original or new creation	Creating something new by putting parts of different ideas together to make a whole.	Create, hypothesize, design, construct, invent, imagine, discover, present, deduce, induce, bring together, compose, pretend, predict, organize, plan, modify, improve, suppose, produce, set up, what if, propose, formulate, solve (more than one answer), arrange, assemble, categorize, collect, combine, devise, explain, generate, manage, perform, prepare, rearrange, reconstruct, relate, reorganize, revise, argue for	Reflects Extends Analyses Evaluates	Self-study, learning through mistakes, create criteria to judge material, conduct a debate, write a half yearly report,

Defining the structure of the training activity

It is imperative to have a plan when delivering a training session. A training session plan is a road map of your lesson. There may be instances when you may not achieve your objectives during a training session. You have to be convinced that people learned what they needed to know. This can only be achieved through an effective training session.

What is a Training Session Plan?

A training session plan is a structured description of the activities and resources to be used to guide a group toward a specific learning objective. The plan can be a simple brief outline or more complex with scripts and notes to be discussed during the training session. However, for an effective training session a plan should be prepared on the following four basic points:
- The subject matter
- Duration of each section
- Methods of instruction for each topic covered
- Measures used to check that people have learned what you needed them to learn

Why Use a Training Session Plan?

It takes time to plan a good training session. However, it is of benefit to the trainer and trainees. Through a well-structured plan, the trainer ensures that all the material is covered during the session and that all information is delivered in a logical order. The trainer can also prepare for the points that the trainees might find difficult to understand. Following the training session the trainer can use the plan to do an analysis of what went well and what did not went well. Any changes may then be introduced during future lessons.

How to Develop a Session Plan

A standard training template may be used to develop a session plan aiming to avoid duplicating topics and organize material consistently over a number of training sessions. The following are the steps required to create an effective training session plan;

Step 1: Define clearly your learning objectives

Trainer is to specify what trainees are expected to learn. The trainer has to determine how these expectations can in actual fact be measured.

Step 2: Make sure that key topics and related concepts are clarified

The trainer will focus on the key ideas or skills to be learned, however any related concepts have to be covered in order to reach the learning objectives.

Step 3: The content to be covered during the training session is to be well-organized

Trainer is to have a general idea of the material to be covered during the session. A lesson outline is to be drafted with all the points to be mentioned

Step 4: Be well-prepared with presentation techniques.

The delivery of the material is important. Learning style is broad and trainees have different learning styles. It is best to use several different presentation approaches to keep the trainees engaged. Use of activities during training sessions will be helpful. Lectures should not take more than 30 minutes or less. Trainer is to summarize the key points at the beginning and end of the session. It the topic is highly specialised, a guest speaker also helps. Other initiatives that trainers may use are:
- Demonstrations - to show the steps in a process or task. Trainees may be requested to do a presentation in front of the group.
- Discussions and debates are also useful following a lecture, as trainees will have the opportunity to ask questions about the concepts that they have just learned.
- Online learning is very helpful when trainees need to gain practical experience, especially if IT skills, if they need to access video or audio material, or if quizzes and self-test activities will be useful
- Role play with trainees participating in a simulated environment. Trainees will also learn from feedback of other participants
- Small group teaching

Step 5: It is a must that an evaluation form is included

It is a must that the session is evaluated through a simple questionnaire to be completed following the session or online

Step 6: Keep the training session within set time

The last and not least is the timing of the session. It is imperative that core concepts that may require more time to master are addressed upfront so that trainees will have additional time to absorb and practice. The time to be allocated for each concept as set in the training plan is to be maintained. It the time allocated is not sufficient, then the trainer will need to run additional sessions or alternatively reduce the number of topics to be covered.

The above tips help the trainer delivering a training session in a logical sequence. Trainees will engage with the training session. An effective plan will help the trainer to achieve the ultimate objective that the trainees will understand clearly and retain what is delivered by the trainer. This plan can also be extended to online training sessions. However, additional checks will have to be implemented in order to ensure whether the students have fully understood the material covered during the training session. An option will be to ask frequent open-ended questions during the course of the session.

Use appropriate material and methods for training delivery

B. Completing the learning experience to engage learners

One of the ways that a trainer can complement the learning experiences is to engage learners through the adoption of a blended learning approach. Singh (2003) describes blended learning as a combination of delivery methods that complement one another to support student's learning. On the other hand Oliver and Trigwell (2005) set out a number of concepts related to blended learning –

- Combining or mixing web based technology to acknowledge an educational good;
- Combining pedagogical approaches (e.g. constructivism, behaviourism, cognitivism) to produce optimal learning outcome with or without instructional technology;
- Combining any form of instructional technology with face to face instructor led training; and
- Combining instructional technology with actual job tasks.

Blended learning has a very positive impact on student engagement and research has found evidence of high exam marks achieved, improved learning outcomes and lower dropout rates, amongst others.

On the other hand, there are a number of challenges that one has to evaluate in blended learning. There would be less time for face to face tuition and this requires greater time commitment from students who may also at this feel isolated / alone. Technological problems may arise and course updating / redesign is also more complex than any other type of learning.

C. Setting a climate for learning

When setting a course for learning, it is important to acknowledge at the outset that adults are completely different from other type of students.

In setting the climate for learning it is suggested that one follows the following criteria making sure that the trainer is fully aware that he / she is addressing a particular type of learner.

1) It is essential that the climate does not make the adult learners look weak or disillusioned.
    - Design training sessions where there is scope for interaction and a good level of engagement by the learners.
    - Do not take risks by taking certain initiatives early in the programme –let the learners blend in and integrate in the first lesson.

2) Understand and acknowledge that you are here dealing with seasoned banking professionals. Therefore, respect their knowledge, opinions and experience. Moreover, leverage on these positive factors when establishing training needs and course content etc.

3) Tying this with 2 above, remember that the learners have been decisions makers for a number of years – sometimes taking very sensitive and important decisions such as those relating to HR, strategy, debt collection etc. Adopt a delicate approach as otherwise as a one way communication where the trainer is seen as "riding the high horse" would certainly not be a conductive climate for learning with this age group.

4) Focus of the importance of the training programme to learners. They are here because they have accumulated a considerable degree of knowledge and experience that they are happy to share with their juniors. The topics and subjects should therefore relate to these important issues which will not only motivate the learners but which will also help them to grow and develop themselves.

5) In setting the climate, understand that adults may tend to be impatient and certain learning patterns may not be tolerated well. Be punctual and ensure that you adopt a number of training methodologies that fit with the style for adult learning. It is important therefore to use case studies, videos, and discussions sessions where the learners feel engaged by contributing and sharing their experiences.

Source: Malcom S. Knowles, Edward E Holton III and Richard A Swanson 2005: The Adult Learners: The definitive classic in Adult Education and Human Resource Developments.

E. Facilitating Learning Activities

There are a number of techniques which will help learners to retain what is being taught to them. These techniques can be brightly summarised below:

1. REFLECT: It is important that the students are given adequate time to reflect on what is being taught, disseminate the information and why not, relate the information to work experience.

2. SUMMARISE: From time to time summarise what is being taught in one or two sentences.

3. SHARE KNOWLEDGE: Impart knowledge and experience on the subject. Giving real life and practical examples of problems and issues and illustrating how these were tackled would not only validate the expertise of trainer but also make the learning experience more interesting.

4. TEACH TROUGH GROUPS: Students can learn a lot by engaging within other students especially here where we are dealing with highly experienced adult learners.

5. RECEIVING FEEDBACK: Give feedback on what the adult learners have learnt.
Source Faculty Adult Learning website

F. Engaging the Learners

Adult learners have a different profile and are likely to react very differently from younger students up to University level.

1) Adult learners will not learn something they are not interested in.

2) Adult learners are more likely to take responsibility for their own learning.

3) Adult learners have a wealth of knowledge and experience and they are more likely to have established values and beliefs (Jarvis 2004)

4) Adult learners would tend to show their interest in full course content at the outset as well as relevance to their own current problems and issues (Rochester Institute of Technology).

Against this typical profile, Keellor and Littlefield have developed the following best practices for teaching adults:
1) Create a safe welcome and learning environment.

2) Create a culture of empathy, respect approachability authenticity.

3) Collaborate on the diagnosis of learning needs.

4) Collaborate on developing learning objectives and institutional planning.

5) Ensure the practically of all learning activities.

G. Active Learning Methods

In active learning, the trainer adopts a student centric approach to learning and he/she does not deliver the training using one way presentation from trainer to student. In active training, the trainer adopts the role of a facilitator and he actively encourages discussions, intervention, input and other active ways in which the students will be highly engaged throughout the training period.

There are a number of active learning methods and the examples below are certainly not an exhaustive list of such methods.

i.   Set up groups of students with the students being asked to discuss an issue / subject / problem within their own group and come up with a consensus view. Rotation of groups and / or a competition between groups makes this type of active learning more engaging.

ii.   Students are teamed up in pairs and each of them will review/comment/ discuss on the work of his team mate / colleagues.

iii. Simply discussing a problem or issue where the trainer would adopt the role of a facilitator and contribute to the moderating of the discussion to ensure that it remains on the right track.

iv.   Role play – where students adopt different characters etc. – by way of illustration as part of a lesson on coaching, one student could act as the coach and the other as the employee receiving the coaching.

v.   Problem solving: trainer would set a particular problem for students and gives them time to resolve it – discussing it at a later stage, how they approached the problem, what was good in the response and what could have been done better.

vi.   Trainer would speak about the subject for 10/15 minutes without the students being allowed to take notes. After the speech, groups of students will recall what has been said, elaborate, discuss and engage with other students and the trainer.

H. Effective Questioning Techniques

Questions are asked during training in order to achieve a number of goals and to make learning more effective. Indeed questions are asked to keep the students alert and motivated, to evaluate the student's grasp of the subject, to review progress from past lessons and perhaps more importantly to ensure that the learning outcome are being achieved.

There are a variety of the type of questions that a trainer can ask Bloom's Taxonomy includes:
1. Knowledge – recall data or information
2. Comprehension – understanding meaning
3. Application - use a concept or situation
4. Analysis – separate concepts into parts, distinguish between facts and references
5. Synthesis – combine parts to form new meaning
6. Evaluation – make judgements about the value of ideas or products

Some researchers have simplified the classification of questions into lower cognitive questions (facts, closed, direct, recall and knowledge questions) involve the recall of information. Higher cognitive questions (open ended, interpretation, evaluation etc.) evoke the mental assessment and analysis of data and/or its application.

The extent of wait time (the time period that is allowed to students after a question has be made) will vary with the type of students and their respective profiles. Putting it differently wait time may be short for quick learners, adult learners and high achievers whilst conversely wait time may be longer for slow learners and underachievers.

The same applies for number of questions ahead. A higher number of questions may be appropriate / tolerated for higher achievers but this may certainly not be the case for under achievers and / or poor learners.

I Group Work

Students tend to learn more actively and effectively when they are in a collaborative learning environment as opposed to a passive learning environment (Murphy, Mahoney, Chen, Mandoza-Diaz & Young 2005). Group work has a number of advantages and these include the following (a) individuals with each group can supplement the information given by other members, (b) teamwork is fostered (c) people tend to think more "outside the box" within a group and (d) there is a greater level of engagement.

In assigning groups it is important to consider
Size – ideally groups should not be more than four students. For more complex tasks larger groups may be feasible but this raises issues of possible lack of coordination and the fact that some members of the group may adopt a passive approach.

Composition; it may be ideal for trainer to set up the groups himself / herself. In this way, the trainer can arrange a "well blended" group taking cognisance of different type of personalities, skills and aptitudes, gender etc.

In certain cases, the trainer, or the team members from within the group itself are encouraged to find a team leader (and / or spokesperson).

In some cases there may be conflict within a group. It is not desirable for the trainer to dissolve this group and for reassigning group members in this case. If this situation happens, the trainer should intervene by trying to come up with resolutions and compromises to the disagreements.