

# TRAINER EXCELLENCE FRAMEWORK



*"Excellence is not an  
act...*

*... it's a habit!"*

Aristotle

 **ITOL**

INSTITUTE OF TRAINING &  
OCCUPATIONAL LEARNING

## ITOL TRAINER EXCELLENCE FRAMEWORK

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### PURPOSE:

The Trainer Excellence Framework has been developed after consultation with many fellow professionals from around the globe in particular Canada, Australia and Scandinavia. We have looked at a number of different models developed by a variety of organisations and bodies and they have each in their own way helped to mould this Framework. Our purpose is a clear and simple one:

*To provide a clear picture of competent trainer performance based on generally accepted practice.*

It is obviously limited in scope, which we acknowledge later in this document, but by keeping it simple our hope is that it becomes more usable and helps to continue driving up the professionalism that is experienced in the training room.

### DEFINITIONS:

We need to be clear, not only about who this framework is for, but also about what activity we are focussing on. Therefore we offer two definitions that have formed the premise of our thinking.

#### Definition of **'Trainer'**

Someone who organises and conducts activity aimed at imparting information to improve the recipient's performance or to help them attain a required change in behaviour; attitude; skill or knowledge.

#### Definition of **'Competence'**

A competence is a set of defined behaviours that provide a structured guide enabling the identification, evaluation and development of those behaviours in individual employees.

## THE ITOL TRAINER EXCELLENCE FRAMEWORK

### 1. Identify & Analyse Performance Gap;

- Establish the need for improvement;
- Identify gap in performance;
- Determine cause of gap;
- Decide how gap is to be closed;
- Articulate success criteria.

### 5. Evaluate & Validate Learning Experience

- Validate learning objectives;
- Evaluate learner reaction;
- Assess transfer of learning;
- Evaluate performance results.



### 2. Design Learning Opportunity;

- Establish learning objectives;
- Decide method of delivery;
- Create opportunity in detail (possible);
- Refine to finished opportunity (actual);
- Develop materials;
- Produce supporting documentation.

### 3. Facilitate Learning;

- Fully prepared;
- Create learning environment;
- Engage & Motivate learners;
- Encourage learning;
- Continually assess learning.

### 4. Support Transfer of Learning;

- Design a transfer plan;
- Implement a transfer plan.

## THE FRAMEWORK:

The Excellence Framework is built around five families of competence and each family has a sub-set of skills attached to it. In order to achieve the highest levels of excellence a trainer should be able to demonstrate proficiency in each skill.

## THE 5 FAMILIES

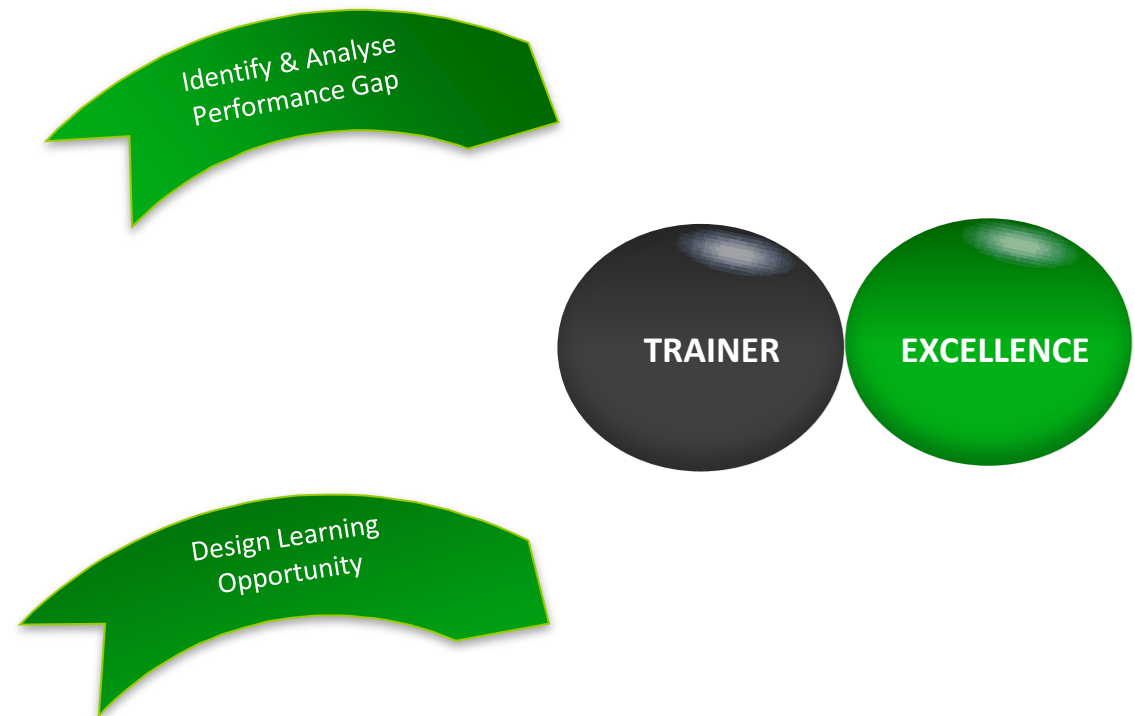
1. Identify & Analyse Performance Gap;
2. Design Learning Opportunity;
3. Facilitate Learning;
4. Support Transfer of Learning;
5. Evaluate & Validate Learning Experience

### 1. Identify & Analyse Performance Gap;

- a) Establish the need for improvement;
- b) Identify gap in performance;
- c) Determine cause of gap;
- d) Decide how gap is to be closed;
- e) Articulate success criteria.

### 2. Design Learning Opportunity;

- a) Establish learning objectives;
- b) Decide method of delivery;
- c) Create opportunity in detail (possible);
- d) Refine to finished opportunity (actual);
- e) Develop materials;
- f) Produce supporting documentation.



### 3. Facilitate Learning;

- a) Fully prepared;
- b) Create learning environment;
- c) Engage & Motivate learners;
- d) Encourage learning;
- e) Continually assess learning.

### 4. Support Transfer of Learning;

- a) Design a transfer plan;
- b) Implement a transfer plan.

### 5. Evaluate & Validate Learning Experience

- a) Validate learning objectives;
- b) Evaluate learner reaction;
- c) Assess transfer of learning;
- d) Evaluate performance results.



## A CHECKLIST FOR EXCELLENCE:

This checklist has been designed to help the implementation of the Framework. It can either be used as an on-going behavioural prompt or as a post event review document with a colleague or manager.

### 1. Identify & Analyse Performance Gap;

Establish the need for improvement;

- How was the need for improvement first identified
- What impact is the current situation having on the process, procedure, person, business

Identify gap in performance;

- What is the current performance being demonstrated
- What is the desired outcome

Determine cause of gap;

- Why has the current performance arisen
- What training, communication, leadership, technology has impacted upon the performance

Decide how gap is to be closed;

- What different methodologies can be used to close the gap
- Who has the responsibility to ensure the change happens

Articulate success criteria.

- What will the overall outcome be following the change
- How and when will the evaluation take place

## 2. Design Learning Opportunity;

Establish learning objectives;

- What will the individual(s) be able to do differently as a result of partaking in the learning opportunity
- What measures will be established

Decide method of delivery;

- How many individuals will this impact and where are their locations
- What is my best option, classroom based, Webinar, one to one, Blanket email communication to suit the audience and numbers involved

Create opportunity in detail (possible);

- What budget do I have to create the learning
- How much time do I have to prepare and deliver to meet the business requirements
- How creative have I been to embark upon the best opportunity of learning methodology

Refine to finished opportunity (actual);

- Who do I need to establish the creation on the decided methodology
- What have I to do to ensure delivery

Develop materials;

- What materials, slides, hand-outs, workbooks, videos, webinars will be required
- What will they need for the future to maintain the desired change

Produce supporting documentation.

- Have I produced all supporting documents for reference and training
- What will be required in 3 months' time to continue the changes in performance

### 3. Facilitate Learning;

Fully prepared;

- Do I have my personal notes, slides, hand-outs as required
- Have I considered all the 5W's and H

Create learning environment;

- Do I have all the correct equipment, VC's, Computers, Projectors, Phones required
- Is the environment conducive to learning the topic being undertaken and reflects this

Engage & Motivate learners;

- What was the learners motivation to attend and was I aware of this
- How did I keep the engagement of the learners during the training

Encourage learning;

- What have I given them to continue the process of learning following the session
- What follow up access have I given them



Continually assess learning.

- When will the determined changes be next assessed
- How will this process happen

#### **4. Support Transfer of Learning;**

Design a transfer plan;

- How will the transfer of knowledge, skill or behaviour be passed throughout the business
- What is the detail needed to continue the successful transfer required

Implement a transfer plan.

- Who will take accountability and responsibility for the plan
- Who has the authority to implement it

#### **5. Evaluate & Validate Learning Experience**

Validate learning objectives;

- Did I meet my initial learning objectives
- Were the learners engaged during the session

Evaluate learner reaction;

- What changes have the learners agreed to demonstrate, undertake going forward
- After 1 month how will I evaluate the changes

Assess transfer of learning;

- What changes have been affected to those who did not partake in learning experience directly
- Has a site been made accessible for people to continually review and input to on a company intranet

Evaluate performance results.

- What further learning's have been requested as a result of your intervention

### **LIMITATIONS:**

The Framework was never designed to cover every aspect of our profession as we grapple with the complexity of the modern world of learning. It is therefore important to understand its limitations, these are chiefly:

- Limited focus on the training practitioner and their activity;
- Not a set of How to's;
- Limited use for specialisms.

### **HOW TO USE THE FRAMEWORK:**

Even with the limitations that we have acknowledged above, 'The Framework' has a number of valuable uses both for personal and career development. It certainly plays a fundamental role in helping to decide upon relevant CPD activities. We see some of its uses as:

- Developing Job Descriptions;
- Writing Performance Plans;
- Reviewing Job candidates;
- Assessing Performance.