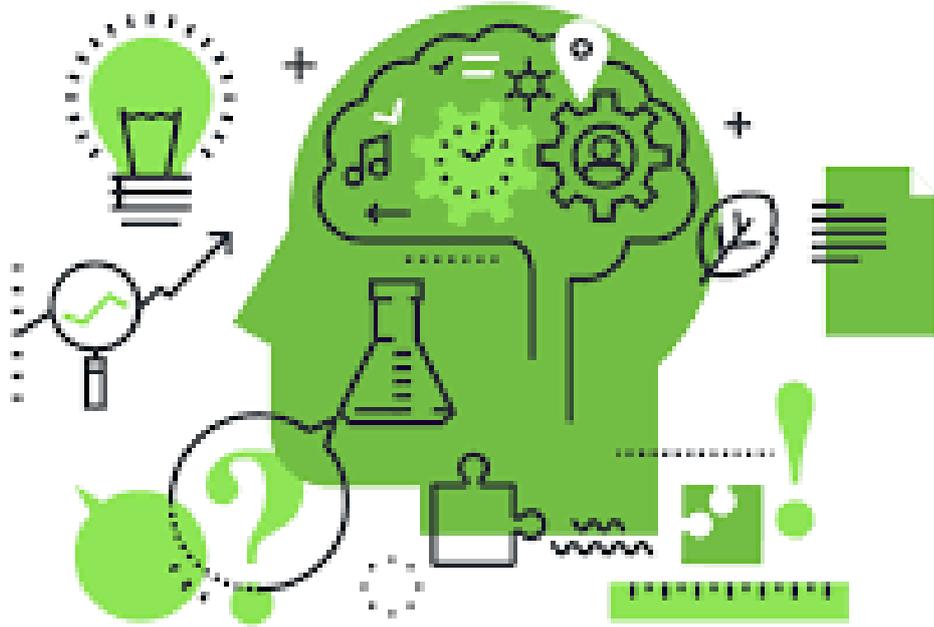




HOME STUDY



Certificate in Designing Learning Events

ITOL
INSTITUTE OF TRAINING &
OCCUPATIONAL LEARNING

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Using the *Programme* to develop yourself at work

A feature of this *Programme* is that it aims to increase your skills in the workplace. Thus while many of the Activities are designed to help you think more generally about the issues raised in the Module, others encourage you to relate those issues to your work, for example:

- by obtaining information about how things are done in your workplace;
- by carrying out particular projects;
- by talking to your manager and other colleagues.

These are called Workplace Activities and they should help you to improve your job performance generally by getting you to think about what you do in relation to what you are learning. We suggest that you may find it useful, as you work through the Module, to keep a working file for information or materials created as a result of Workplace Activities. Some of this work may be useful as supporting evidence for when you are assembling a Portfolio of Evidence for assessment.

It may be that you are not interested in evidence keeping, even so, you may still find it useful to look at and work through the Workplace Activities, just to see how the issues you are reading about relate to your job.

What if I'm not currently employed in training?

As we stated initially, the aim of this *Programme* is to help you function more effectively as a trainer whether you work full-time in training or whether your training activities are just a small part of your job. But it may be that you are currently employed in a totally different field, or are not employed at all, and are looking to use this *Programme* to help you get into training. In which case, you can do one of two things:

- you can ignore the Workplace Activities and concentrate on acquiring the basic knowledge given by the text and by the other Activities, etc.;
- you can apply the Workplace Activities to other situations, such as experience you have gained in previous jobs, in your leisure activities, or through voluntary work.

INTRODUCTION TO THIS MODULE

Over the years there have been numerous theories about how people learn. Each successive revelation adds a little more to our understanding of what helps and what hinders learning. These discoveries are reflected in the continuous development of new aids to learning and in improved methods of training. Nevertheless the principles governing learning are still largely a matter of conjecture and opinion and are not scientifically established to the extent that they are in, say, many branches of engineering.

This means that designing training to help people learn has as much to do with intuition as it does with science. There is no set procedure or right way of doing it. That is not to say that we do not have many useful concepts, experiences, technologies and techniques upon which to call. The aim of this Module is to introduce you to a number of these and help you apply them to the design of learning in your own work situation.

In this Module we will:

- discuss the important factors involved in specifying learning requirements;
- examine ways of designing learning;
- provide guidance on devising learning plans.

Objectives

When you have worked through this Module you will be better able to:

- specify the learning requirements to meet identified needs;
- identify and select options for meeting learning requirements;
- design learning to meet the needs of individuals and small groups;
- specify the resources and systems needed to support learning;
- develop and agree learning plans with learners and resource providers.

PART 1
SPECIFYING LEARNING REQUIREMENTS

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INTRODUCTION

'Would you tell me, please, which way I ought to go from here?' said Alice.

'That depends a good deal on where you want to get to,' said the Cat.

'I don't much care where –' said Alice.

'Then it doesn't matter which way you go,' said the Cat.

The Cheshire Cat's reply to Alice is a basic truth that applies to most, if not all, decisions in life. It is certainly true for **training** – effective training that is. Unless we know what we expect to achieve as a result of people **learning** new things, the whole exercise is aimless.

It is an unfortunate fact that much training effort is ill directed, because insufficient attention has been given to specifying **what** must be learned and, equally importantly, **why**. Individuals may choose to learn for learning's sake, just for the pleasure it gives them. The world of work, however, cannot afford and has no need for such indulgence.

Professional trainers must be clear in what way their organisations expect to benefit from training initiatives. Without this knowledge it is impossible to specify who needs to learn what and when they need to learn it.

For learning to be effective it is also essential that the trainer is fully aware of the knowledge and skills the learner has at the start of the programme. No one takes kindly to being taught things they already know, nor conversely to feeling totally out of their depth.

Part 1 of this Module examines these issues and suggests ways of dealing with them to enable you to produce specifications of learning requirements that will meet with the approval of all concerned.

When you have completed this Part of the Module you should be better able to:

- understand the importance of objectives and distinguish between the different types that are associated with learning and training;
- determine the entry behaviour and situation of learners;
- distinguish between different types of learning outcome;
- specify learning requirements for individuals and groups and gain agreement and commitment to your proposals from all concerned.

1.1 AN OVERVIEW OF LEARNING DESIGN

What exactly do we mean by 'design' in the context of learning? According to the Oxford English Dictionary, design is:

'A plan or scheme, conceived in the mind, of something to be done; the preliminary conception of an idea that is to be carried into effect by action.'

Design must always be related to the purpose of the project. For example, you would have a different design for a sports car than for a family saloon, and a magazine aimed at those interested in a stylish and beautiful home would look different from a magazine for those who wanted to build model boats. With training, therefore, before you can determine the design you have to be sure of the precise need: this whole process is known as training needs analysis.

ACTIVITY 1

Imagine that you have to compose an important and complicated letter, perhaps a job application or a complaint about some poor service received. What stages will you go through when designing your letter? List three or four stages in the design process before you can write the letter.

You probably defined a design process that involved the following stages:

- focus on the **purpose** of the letter;
- consider the **nature** of the need/problem that has to be addressed (a letter applying for a job is different from a letter of complaint in tone, detail and possibly layout);
- examine a **range of alternative approaches** and components (information, topics, arguments, etc.) that you could use;
- select a **particular approach** and the particular components that you will use.

ACTIVITY 2

Having planned your letter, how are you going to judge whether it is suitable for its purpose? Identify the criteria you will use to assess its suitability.

You may have suggested criteria along the following lines:

- addressed to the right person;
- clearly stated main issues;

- language kept simple;
- no irrelevant content.

Now you are in a position to put your design into effect, ie. you can now:

- construct your ideas into an integrated whole – the letter;
- apply your criteria for the suitability of the letter.

Designing anything, therefore, involves several stages including determining purpose, assessing need, deciding approach and final evaluation, before the design can be implemented.

Questions facing the training designer

Designing training or learning goes through similar stages, dictated by a series of questions that much all be answered to the best of the designer's ability.

- What are the training needs? Who needs to learn what?
- What are the current capabilities of the prospective learners?
- What are the learning objectives?
- What is the training content?
- What are the most suitable training methods and aids?
- What is the best sequence of training?
- When should the training take place?
- What resources are needed to provide the training?
- What systems are needed to administer the training?
- How can the effectiveness of the training be assessed?
- How can commitment to the design be obtained from all concerned?

However, such questions cannot necessarily be answered in this convenient and apparently logical sequence. They are highly interactive and decisions relating to one will impact on 'earlier' or 'later' questions. For example, questions about the availability of resources may lead to revising decisions on suitable training methods. It is, therefore, vital to address all the questions throughout the design exercise until you reach a workable solution.

Some of the concepts involved in the design of learning, such as the identification of training needs and the writing of learning objectives, are covered in more detail in earlier Modules. It is, however, worth recapping on the concept of a **learning unit** as this forms the basis for all learning design.

A learning unit is a cycle made up of four components.

The four components are:



- **Objective:** defines the intended outcome of the learning unit. It describes the learners' terminal behaviour, ie. what they should be able to do as a result of completing the learning unit, and should be derived from the **performance aim** (see Section 1.2 below).
- **Entry behaviour:** describes the learners' capabilities, the things they are able and willing to do when starting the learning unit.
- **Performance assessment:** defines how the performance described in the objective is to be measured.
- **Learning event:** provides the learning experience to be undertaken by the learners to enable them to achieve the performance defined in the objective.

In this Module, we'll be discussing objectives, entry behaviour and how to design the learning event.

1.2 WHAT ARE WE TRYING TO ACHIEVE?

This is the first question we must ask ourselves when setting out to design a learning event. It applies to the design of all kinds of learning events, but we will concentrate in this Module on the design of relatively straightforward learning courses and sessions for individuals and small groups. More complex training programmes such as those to support the introduction of Total Quality Management (TQM) or complete apprentice training schemes are dealt with in another Module.

The purpose of training, for an organisation or department, can be described by:

- a **performance aim** which is a broad statement of purpose such as *'To develop staff to prepare them for future promotion'* or *'To increase sales of the DIY product range'*;
- a **performance objective** which is more specific than a performance aim and may well include a quantifiable target, for example *'To increase the sales of DIY products to the Garden Centre sector of the market by 10% in the next six months'*.

The training requirements of the individual trainee are described by **learning objectives**, which exist at two levels:

- **Training objectives** (higher level) which should give a clear and precise statement of what the learners will be able to do at the end of the training, for example *'The trainee is to be able to install TV sets safely into the customers' homes, tuning them to receive BBC1, BBC2, ITV and Channel 4'*.
- **Enabling objectives** (lower level) which are clear and precise statements of what the learners will be able to do at the end of specific learning units. They are also referred to as learning unit objectives. For example, *'The trainee is to be able to:*
 - *carry the TV without damage to the set or customer's property and without sustaining personal injury;*
 - *fit a 3-pin plug to the set and insert a fuse of the correct rating within 2 minutes;*
 - *tune the TV to the specified channels using the correct procedure'*.

We can graphically represent the relationship of these different objectives, as follows:



ACTIVITY 3

In the ideal world the **performance objective** and the **training objective** would coincide. However, under training conditions it is seldom possible for learners to attain the level of competence required of the fully experienced worker in the work situation.

Suggest two reasons why this performance gap is likely to occur.

Your suggestions may have included:

- the amount of time needed to gain experience in all the variations of performing the tasks, which may be greater than the time available for trainees;
- the difficulty in simulating the real working environment for training purposes;
- the availability of machines and systems for training that truly duplicate the ones actually used.

It is important to keep the performance objective in mind when designing training, although it may be setting a higher standard of performance than you intend your learners to achieve at the end of training. So where should the training objective be pitched in relation to the performance objective?

A typical learning curve starts from a low entry standard of performance to the exemplary standard of the performance objective. Where the curve flattens out, a considerable amount of time is taken up to gain only a small improvement in performance. Moving the training objective up or down has a significant effect on the time taken and the costs incurred.

You will have to make judgments based on time and costs and the consequences of a person working at less than the standard of performance ultimately required. We may be prepared to accept that our house painter is a little below par but would not feel so happy if the surgeon removing our appendix is not up to scratch! Remember that, as a training designer, you should not see your responsibilities stopping at the end of 'formal' training if you are in a position to influence the transfer of learning to the job situation.

For example, you can organise or carry out post-course coaching, performance monitoring and testing, encourage self-appraisal and help to identify the reasons for substandard performance.

Even where the training objective falls short of the performance objective, it is well worth while ensuring that all involved in training – the trainer, the trainees, and the trainees' managers – are clear as to what the performance objectives are.

There are many advantages in people being aware of the performance objectives:

- trainees feel motivated because they can see some point in the exercise and can relate what they are learning to their job;
- trainers are able to tailor the training more intelligently to the needs of the trainees;

- managers who are aware of the purpose behind their subordinates' training are in a position to provide support and assistance. If they are not aware they cannot offer such support and may quite likely choose to be positively unhelpful.

When designing learning be sure that you know what that learning is intended to achieve.

Don't be like Alice!

SELF CHECK 1
<p>Before moving on, check your understanding of what you have learned by answering the following questions. You will find solutions at the back of the book.</p> <p>1. Objectives that describe the _____ of the training in operational terms are called _____ objectives.</p> <p>2. Training objectives are made up of several _____ objectives which state what a trainee should be able to _____ at the end of specific _____ units.</p>

1.3 WHERE ARE WE STARTING FROM?

Performance and training objectives can be set with a fair degree of clarity and precision. The purpose of the training and the expected operational outcomes can usually be specified in reasonable concrete terms. Now comes the difficult part, because however well you have worked out what has to be achieved in terms of the organisation's objectives, you now have to take the learner into account.

What has to be learned by any particular individual depends upon where he or she is starting from in terms of relevant knowledge and skills.

How **readily** people learn depends upon two main factors:

- their willingness to accept the change that is associated with the training;
- their own preferred styles of learning.

This means that if you are to design effective learning events it is just as important to **know your learner** as it is to be clear about the expected outcomes.

We call the learner's starting position his or her **entry behaviour**. Entry behaviour can be defined as:

'The existing behaviours of a learner in terms of knowledge, skills and attitudes, which a learner brings to a learning event.'

The design of every learning event should be based upon the difference between the training objectives to be achieved and the learner's entry behaviour. This is the training gap which the learning event is to bridge. Entry behaviour:

- determines where a learning event should start;
- helps to determine appropriate content, methods, sequence, etc.

Taking account of the learner's entry behaviour, what that person knows, can do and is prepared to do, is a major factor in the design of a successful learning event because success is dependant on the extent to which the event bridges the training gap.

Frequently we have to design training for groups of people as opposed to individuals. If we are fortunate we may have a clearly defined group of learners, with very similar problems and abilities. However, more often than not we are faced with a demographic mix drawn from a wide spectrum of ages and experience all trying to cope with a rapidly changing working environment. This mix of entry behaviours clearly complicates the designer's task because the training gap for each person is different.

Let's examine entry behaviour more closely by first looking at the situation faced by Carol Jennings, the training officer of a regional travel agency chain.



Carol's employers have decided to attempt to increase the level of business by selling their products and services using telesales methods. One member of staff from each of ten of their twenty five branches is to be trained in telephone selling techniques in order to carry out a pilot exercise.

The sales targets have been set and the individuals to be involved in the pilot selected by their branch managers. Carol has analysed the knowledge and skill requirements of the job and written the overall training objectives.

ACTIVITY 4

Carol is under pressure to start training immediately. What, if any, further important information about the people taking part in this training programme does Carol need?

Carol was particularly concerned about any differences among the trainees in terms of their:

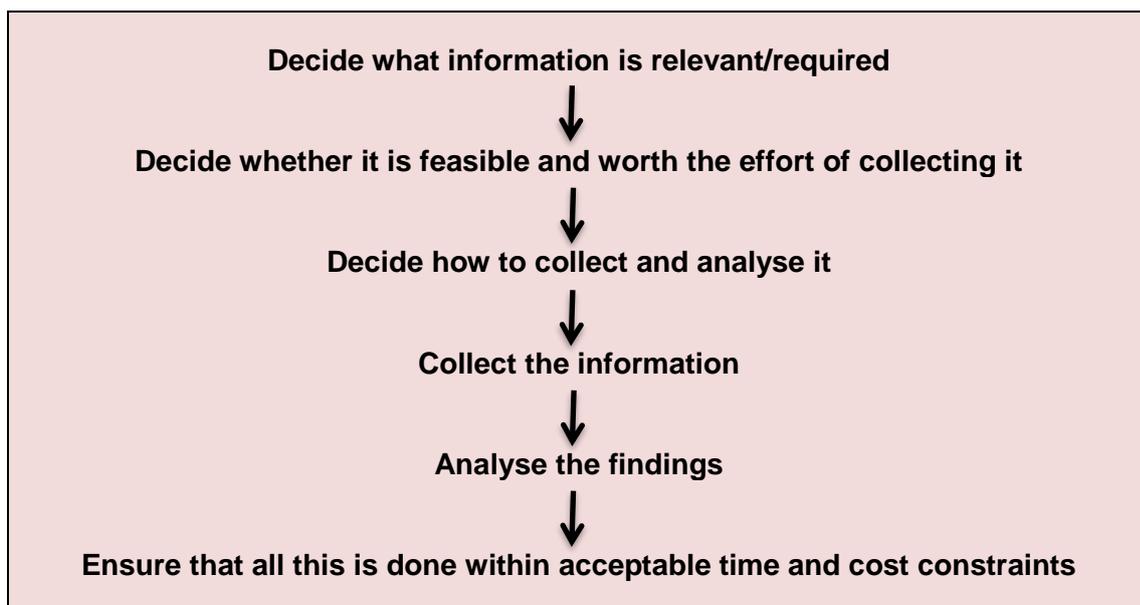
- willingness to take on telesales;
- current sales experience;
- extent of product knowledge.

Failing to establish the entry behaviours of trainees can jeopardise training in many ways, for example:

- if training is pitched too low the trainees will be bored and feel insulted;
- if training is pitched too high trainees will feel inadequate and threatened;
- if the range of entry behaviours is too diverse then both of the above will occur and possibly learning will be further destroyed by conflict within the group;
- if some trainees are resistant to the proposed change in their duties they will be reluctant to learn and may disrupt the learning of those who are committed;
- if the methods of training chosen conflict with the preferred learning styles and personal characteristics of the individuals, learning will be impaired and frustration, apathy or anger may result.

1.4 RESEARCHING ENTRY BEHAVIOUR

How do we go about researching the entry behaviour of trainees? Firstly we need to establish a logical approach, such as the one in the following diagram:



Determining relevant information

It can be helpful to have a checklist of types of entry behaviour information when trying to decide what may be relevant in a particular situation.

ACTIVITY 5

Draw up a checklist of the relevant factors that affect entry behaviour in the context of your organisation or sphere of influence.

Produce your checklist on separate sheets of paper and use the headings below as a guide. Each heading gives you a relevant factor as an example. Try to add at least two more factors under each main heading.

- Personal particulars of learner, eg. age.
- Learner's motivation, eg. wants to learn.
- What the learner can do, eg. good at written communication.
- What the learner knows, eg. manufacturing processes.
- What the learner has done, eg. previous work experience.
- How the learner best learns, eg. in group situations.

The contents of your checklist will probably include some of the following factors, depending on your own circumstances.

Personal particulars of learner

- age;
- career aspirations;
- special attributes;
- education;
- other aspirations;
- special needs.

Learner's motivation

- wants to learn;
- accepts responsibility for own learning;
- accepts change in duties/responsibilities;
- learner's emotional well-being, and general feelings of self-confidence.
- recognises a learning need;
- agrees with the training objectives;
- learner-boss relationship;

What the learner can do

- written communication;
- mathematical ability;
- leadership skills;
- oral communication;
- interpersonal skills;
- planning skills;

- fault finding skills;
- manual dexterity;
- performance standard in current job.
- use of tools and equipment;
- physical capacity;

What the learner knows

- processes;
- procedures;
- company politics;
- products and services;
- science/technology;
- previous experiences as a learner.

What the learner has done

- previous work experience;
- experience relevant to the proposed learning;
- time in current job;
- previous experience as a learner.

How the learner learns best

- in group situations;
- learning skills;
- preferred way of learning;
- in one-to-one situations.

How much research should be done?

Having decided what information is relevant, the next step is to determine whether it's feasible and worth the effort to research entry behaviour to the level indicated by such information requirements. Consider the following example:



A refrigerator manufacturer has decided to increase the flexibility of its nationwide after-sales servicing operation.

Service engineers who have previously specialised in the maintenance of industrial refrigeration plant are now also to take on the maintenance and repair of domestic refrigerators. Training has to be designed to include the diagnostic and repair routines and the skills/behaviour required when dealing with customers in their own homes.

ACTIVITY 6

What factors do you consider the company's training designer, Mangat Singh, should take into account when assessing the feasibility and deciding the effort that should be put into determining the entry behaviour of the service engineers? Try to suggest at least four factors.

For example:

The lead time available before the training must be implemented

