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INSTITUTE OF TRAINING &
OCCUPATIONAL LEARNING

TRAINER EXCELLENCE FRAMEWORK

"EXCELLENCE IS NOT
AN ACT
... IT'S A HABIT"

ARISTOTLE

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 several different models developed by a variety of organisations and bodies, and they have each in their own way helped to mold 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 focusing 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 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**

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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.

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 and motivate learners.
- Encourage learning.
- Continually assess learning.

4. Support Transfer of Learning.
- Design a transfer plan.
- Implement a transfer plan.

5. Evaluate and Validate Learning Experience.
- Validate learning objectives.
- Evaluate learner reaction.
- Assess transfer of learning.
- Evaluate performance results.

TRAINER EXCELLENCE

1
2
3
4
5

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 because 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 learner's 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 pasted 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 several 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.

Follow-up?

If you need to improve your competence levels why not consider our range of **Home Study, Self-Development and CPD courses.**
They are the **'Nuts & Bolts'** of our competence as trainers.

- TNA.
- Design.
- Delivery.
- Evaluation

Each course workbook is more than 100 pages and has an abundance of learning material.
In addition, there are a minimum of
25 Learning Activities.
15 Optional Workplace Assignments.
7 Self Assessments.
3 Progress Checks

If you wish to become a Qualified Trainer and use the appropriate letters after your name, that attest to your professional credibility, please check out our **Certificate in Training & Development.** This Qualification is globally recognised for being both academically robust and possessing 'real world' practicality.

For more information you can go here **CTD** or phone us on **0151 236 1813**
We will be more than happy to chat things over with you.