

## TAADEL403A

### Unit Descriptor

## Facilitate individual learning

This unit specifies the competency required to facilitate individual learning through a one-on-one relationship between a learner and facilitator.

### Application of the Unit

Learning facilitation relationships may take a number of forms including structured / semi-structured activities and formal / informal agreements. They may be independent of or part of a broad learning and delivery strategy. Identifying which learners and learning contexts may benefit from individual learning facilitation forms part of this competency.

Establishing an appropriate mutual relationship is critical, and the communication and interpersonal skills of the trainer / facilitator are paramount in creating the necessary preconditions for individual learning facilitation to be effective.

Two major techniques to facilitate individual learning are derived from mentoring and coaching methodologies. Other similar instructional techniques may also be appropriate, such as tutoring. The trainer / facilitator may use these techniques with one learner or with individual learners in a small group context.

Individual learning / facilitation relationships may be used to help an individual or individuals meet personal or job goals, learn new skills / knowledge or develop new learning / work behaviours. The role of the trainer / facilitator using these techniques is to advise, guide, support and respond to the needs of the individual learner.

The delivery mode may be face-to-face, online, via telecommunication or using a combination of media.

The competency specified in this unit is typically required by trainers / facilitators, supervisors, managers, leaders, practitioners, teachers, assessors and consultants.

### Unit Sector

Delivery and Facilitation

### ELEMENT

### PERFORMANCE CRITERIA

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|---|---|
| 1. Identify individual learning facilitation requirements | <p>1.1 The need for <i>individual learning/facilitation</i> in the <i>learning area</i> is identified</p> <p>1.2 The <i>goals for learning</i> for individual learning / facilitation are identified and discussed with relevant persons</p> <p>1.3 Appropriate <i>individual learning / facilitation techniques and processes</i> are identified and documented to support individual learning needs and goals</p> <p>1.4 <i>Evaluation processes</i> are developed and agreed</p> <p>1.5 <i>Organisational support</i> for implementation is obtained, where relevant</p> |
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|--|---|
| 2. Establish the learning / facilitation relationship            | <ul style="list-style-type: none"> <li>2.1 The individual's learning style, learner characteristics and the context for learning are identified</li> <li>2.2 The appropriate technique / process to facilitate individual learning is <i>selected or organised</i> and the basis of the technique / process is explained and discussed with the individual learner</li> <li>2.3 The <i>boundaries and expectations</i> of the learning / facilitation relationship are clarified and agreed using effective <i>communication and interpersonal skills</i></li> <li>2.4 Any <i>equity or additional support</i> needs are clarified</li> <li>2.5 An <i>individualised learning plan</i> is developed, documented and discussed with the learner</li> </ul>   |
| 3. Maintain and develop the learning / facilitation relationship | <ul style="list-style-type: none"> <li>3.1 <i>Preparation</i> for each meeting / session is evident</li> <li>3.2 Effective communication and interpersonal skills are used to grow the relationship and sustain active participation</li> <li>3.3 <i>Structured learning activities</i> are developed to support and reinforce new learning, build on strengths and identify areas for further development</li> <li>3.4 <i>Leadership and motivational skills</i> are demonstrated to enable the learner to take responsibility for learning</li> <li>3.5 <i>Learner cues</i> are observed and <i>changes in approach</i> are made, where necessary, to maintain momentum</li> <li>3.6 <i>Ethical behaviours</i> are practised at all times</li> <li>3.7 Regular meetings are agreed to by both parties and scheduled to monitor the effectiveness of the learning / facilitation relationship</li> <li>3.8 Appropriate documentation to support the relationship is mutually developed and maintained</li> </ul> |
| 4. Close and evaluate the learning / facilitation relationship   | <ul style="list-style-type: none"> <li>4.1 <i>Tools and signals</i> are used to determine readiness for closure of individual learning / facilitation relationship</li> <li>4.2 The closure is carried out smoothly using appropriate interpersonal and communication skills</li> <li>4.3 <i>Feedback</i> is sought from the learner on the outcomes achieved and the value of the relationship</li> <li>4.4 The <i>impact</i> of the learning / facilitation relationship is reviewed using identified evaluation processes</li> <li>4.5 <i>Self-evaluation and reflection</i> on own performance in managing the relationship is carried out and areas for improvement are identified</li> <li>4.6 The outcomes of the learning / facilitation relationship and evaluation of the process are documented and filed in accordance with legal, organisational and personal requirements</li> </ul>  |

## KEY COMPETENCIES

Key Competency	Example of Application	Performance Level
Communicating ideas and information	communicating verbal and non-verbal messages at every stage of the facilitation session / process  communicating to check for comprehension and to reinforce learning  using written communication for individual learning plans, evaluations and activities	3
Collecting analysing and organising information	gathering information about the participant and using it to direct the facilitation process  collecting and organising information for new skill development	2
Planning and organising activities	developing a wide range of learning activities for the participant to develop their skills	3
Working with others and in teams	working within a particular organisational context	2
Using mathematical ideas and techniques	timing facilitation methods, processes and activities	1
Solving problems	solving problems in terms of new skill development or unforeseen difficulties in learning  solving problems in working within the organisation	2
Using technology	using technology to develop and produce written information  using technology to demonstrate new skills	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the Performance Criteria.

Need for individual learning / facilitation may be:

- proposed by the learner, a manager / department in the organisation, or the trainer / facilitator
- a requirement of management
- part of the delivery strategy of a Training Package qualification, course or learning program
- a request for additional support to enhance learning
- based on observation

- Learning area may be:
- organisational / individual
  - a new / changed job role
  - new or changed work procedures / work skills
  - technical skills
  - life skills
  - generic skills
  - management skills
  - units of competency in Training Packages
  - curriculums
- Goals for learning may include:
- learning a new skill / area of knowledge or competency
  - defined through learning outcomes or objectives of a learning program
  - increasing productivity
  - career advancement or redirection
  - changes in life direction
  - setting personal directions / achievements
  - relationship development
- Relevant persons may include:
- the learner
  - the workplace supervisor / coordinator / manager
  - other team members
  - other trainers / facilitators / teachers / lecturers
- Individual learning / facilitation techniques and processes may include:
- a formal or informal process
  - an ongoing or one-off process
  - a specific circumstance or an integrated feature of the overall learning process
  - coaching techniques
  - mentoring techniques
  - tutoring techniques
  - peer relationships
  - matching experienced workers / learners
  - single or double loop learning approaches
- Evaluation processes may include:
- a formal evaluation tool
  - quantifiable measures such as increased productivity / achievement of new skills
  - level of attendance
  - critical feedback from learner and others
- Organisational support may include:
- agreement by organisation to provide additional assistance to individuals through identified techniques
  - venue and equipment support
  - additional time with learner

Individual's learning style may include:

- auditory
- visual
- kinaesthetic
- tactile
- left / right brain
- global / analytical
- theoretical
- activist
- pragmatist
- reflective

Learner characteristics may include:

- language, literacy and numeracy requirements
- specific needs, physical or psychological
- preferred learning styles
- employment status
- past learning experiences
- level of maturity
- cultural background and needs
- level of formal schooling in Australia or overseas
- length of time resident in Australia

Context for learning may be:

- determined by the area of learning
- determined by the trainer / facilitator and the learner
- defined by the work / learning activities
- in a classroom, tutorial room, meeting room, office, work in situ, any agreed meeting place
- in a workplace, training and/or assessment organisation, college, community, university or school
- defined by the time requirements for individual facilitation and how these will be built into learning activities
- impacted by the health, safety or welfare of the learner

Selected is defined as:

- where the trainer / facilitator has the capacity to independently determine which technique / process will be most appropriate

Organised is defined as:

- where the trainer / facilitator is operating in circumstances where the technique / process is part of an existing delivery system

Boundaries and expectations may include:

- the roles and responsibilities of the trainer / facilitator
- the roles and responsibilities of the learner
- extent / limits of the relationship
- the techniques / processes to be used
- confidentiality
- the range of expertise of the trainer / facilitator
- the involvement of others
- organisational expectations
- reporting requirements

Communication skills must include:

- using icebreakers as appropriate
- building rapport with the learner
- using effective verbal and body language
- demonstrating a capacity to communicate clearly to facilitate the learning
- using critical listening and questioning techniques
- providing constructive and supportive feedback
- accurately interpreting verbal messages
- assisting learners to paraphrase advice / instructions to the trainer / facilitator
- providing clear and concrete options / advice
- using appropriate terminology and language of the industry / profession
- ensuring language, literacy and numeracy (LLN) used is appropriate to the learner

Interpersonal skills must include:

- showing respect for the expertise and background of the learner
- demonstrating sensitivity to diversity, disability, culture, gender and ethnic backgrounds
- modelling facilitation and learning behaviours
- engaging in two-way interaction
- encouraging the expression of diverse views and opinions
- negotiating complex discussions by establishing a supportive environment
- using language and concepts appropriate to cultural differences
- accurately interpreting non-verbal messages

Equity or additional support needs may include:

- English language, literacy and numeracy support
- disability support
- Aboriginal and Torres Strait Islander support
- ethnic support services
- interpreting services
- counselling services
- community support

An individualised learning plan includes:

- the goals to be achieved
- contingency plans
- the logistics of the learning relationship, for example:
  - period of relationship
  - frequency of meetings / length of sessions
  - location of meetings / contact
- the structure of the learning relationship, for example:
  - activities to be undertaken
  - monitoring processes
  - tools / equipment needed
  - shadowing
- occupational health and safety (OHS) considerations

Preparation may include:

- planning for each meeting / session
- being organised for each meeting / session
- reflecting on outcomes of previous meeting / session
- being punctual
- identifying 'where we are' at the start
- appearing relaxed and confident
- enabling learner to identify his/her perspective
- providing a relaxing, non-threatening environment

Structured learning activities may include:

- direction, guidance and mutual discussion
- role-plays
- written exercises
- demonstrations
- practice opportunities e.g. practicum or supervised teaching / facilitation
- role modelling
- projects
- readings
- research
- video / audio analysis
- a learning journal

Leadership and motivational skills may include:

- maintaining focus
- transferring responsibility
- empowering the learner
- inspiring the learner
- visualising the learner's perspective
- using effective communication

Learner cues may include:

- level of engagement / disengagement
- regular / irregular attendance / absences
- evidence of frustration, distraction, stress
- level of communication / interaction
- level of ease / difficulty in undertaking learning activities
- stagnation in learning
- level of dependence / independence
- evidence of problems / issues which may be personal, employment-based or related to the individualised learning

Changes in approach may include:

- revision of individualised learning plan
- fresh approach / shift in technique
- problem solving
- shift in level of guidance / level of independence

- Ethical behaviours include:
- trust
  - integrity
  - privacy and confidentiality of the session
  - following organisational policies
  - knowing own limitations
  - having a range of other intervention referrals ready when needed
  - honesty
  - fairness to others
- Tools and signals may include:
- self-assessment by the learner
  - a measure of improvement in a particular area
  - readiness for formal assessment
  - level of independence in learning
  - readiness to maintain learning through other means or modes
  - severe / fixed blockages in the relationship
  - agreed time period over
- Feedback may be:
- interview
  - formal discussion
  - informal discussion
  - written questionnaire
- Impact may be:
- successful achievement / rate of achievement / lack of achievement of identified goals
  - achievement of other outcomes as a result of the relationship
  - development of new goals
  - increased / new motivation to learn
  - greater capacity to learn
  - development of or increase in the self-confidence of the learner
- Self-evaluation and reflection may include:
- asking critical questions about own ability, what worked, what did not work and how the relationship building process could be improved
  - reviewing records and journals on sessions and critically evaluating own performance
  - reviewing feedback from learner and identifying critical aspects and areas for improvement



## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of assessment followed by identification of specific aspects of evidence that will need to be addressed in determining competency. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the TAA04 Training and Assessment Training Package.

To demonstrate competency against this unit candidates must be able to provide evidence that they can establish and maintain an effective learning / facilitation relationship with an individual learner.

The trainer / facilitator must demonstrate the development of a relationship, in one or more delivery modes which is learner-centred, adaptable to individual needs, and appropriate to the learning area or focus of the relationship. Demonstration of effective techniques, communication, interpersonal skills and problem solving skills are pivotal to demonstrated competency in this unit.

### Required knowledge includes:

- the effects of verbal and non-verbal communication, for example:
  - how to interpret behaviours
  - how to model behaviours and values
- sound knowledge of different learning styles and how to encourage different learners, for example:
  - theoretical learners
  - pragmatic learners
  - activist learners
  - reflective learners
  - kinaesthetic learners
  - audio learners
  - visual learners
  - tactile learners
  - left / right brain learners
- the learning cycle, including:
  - concrete experience
  - observation and reflection
  - concept formation
  - testing new learning
- learning principles, for example:
  - adults have a need to be self-directing and decide for themselves what they want to learn
  - adults have a range of life experience, and connecting learning to experience is meaningful
  - adults have a need to know why they are learning something
  - adults need to be respected
  - adults prefer learning to be relevant and practical
- the needs and characteristics of the individual learner
- change processes, for example:
  - how people work through change
  - behaviours associated with change
- the organisational culture, for example:
  - how individualised learning is perceived and valued
  - workplace arrangements for individualised learning
  - industrial relations implications

- regulatory requirements
- current techniques to facilitate individual learning
- how to create new learning activities
- learner cues that may reflect difficulties with individual learning facilitation relationships
- sources of external support
- measurement or evaluation tool development
- other learning options, learning activities and referrals
- relevant policy, legal requirements, codes of practice and national standards including Commonwealth and state / territory legislation, for example:
  - competency standards
  - licensing
  - industry / workplace requirements
  - duty of care under common law
  - recording information and confidentiality requirements
  - anti-discrimination including equal opportunity, racial vilification and disability discrimination
  - workplace relations
  - industrial awards / enterprise agreements
  - National Reporting System
- OHS relating to the work role, including:
  - reporting requirements for hazards
  - safe use and maintenance of relevant equipment
  - emergency procedures
  - sources of OHS information

**Required skills and attributes include:**

- use of empathy to:
  - build rapport
  - communicate the feeling of threat and risk when facilitation begins
  - deal appropriately with a range of emotions
- interpersonal skills to:
  - set up a comfortable environment
  - demonstrate awareness of own behaviour
  - use appropriate humour to lighten atmosphere
  - keep the sessions learner-centred
- analysis skills to:
  - identify suitable learning / facilitation techniques and activities for the individual learner
- flexibility to:
  - determine and alter a learning plan
  - negotiate with the learner to ensure facilitation is suitable
  - be patient with individual's learning ability
  - interpret information gathered and adapt own style accordingly
- communication skills to:
  - give positive and negative feedback
  - demonstrate awareness of own behaviour
  - negotiate and manage conflict
  - confirm, clarify or repair understanding
  - build constructively on what has been said
- learning and facilitation techniques to:
  - lead and motivate learners to take responsibility for their own learning
  - maintain momentum during the learning process
  - facilitate individual learning through a one-on one relationship
- literacy skills to:
  - develop the learning plan
  - maintain records and other documentation
  - read and interpret relevant documentation
- recognising and being sensitive to individual difference and diversity, for example:
  - being sensitive to and valuing culture
  - acting without bias / discrimination
  - responding to individuals with particular needs
  - recognising the importance of religion
- time management skills to:
  - structure sessions
  - drive the process to achieve goals

**Products that could be used as evidence include:**

- individual learning plan
- facilitation activities
- evaluations from participants or organisation
- evidence of self-evaluation and improvement of skills, for example, a learning journal
- audio or video of a facilitation session

**Processes that could be used as evidence include:**

- how communication skills have been used in facilitating / learning, particularly questioning techniques, listening and interpretation, and why
- how the individual's learning area, style and context were matched to the learning facilitation methods, process and activities utilised
- how learning was structured to build new skills, and why
- how reflection and insight into learning was developed in the learner
- how the trainer / facilitator relationship was terminated, and why

**Resource implications for assessment include:**

- materials and information for facilitation
- permission of organisation for time and resources

**The collection of quality evidence requires that:**

- assessment must address the scope of this unit and reflect all components of the unit i.e. the Elements, Performance Criteria, Range Statement, Evidence Requirements and Key Competencies
- a range of appropriate assessment methods / evidence gathering techniques is used to determine competency
- evidence must be gathered in the workplace whenever possible. Where no workplace is available, a simulated workplace must be provided
- the evidence collected must relate to a number of performances assessed at different points in time and in a learning and assessment pathway these must be separated by further learning and practice
- assessment meets the rules of evidence
- a judgement of competency should only be made when the assessor is confident that the required outcomes of the unit have been achieved and that consistent performance has been demonstrated

**Specific evidence requirements must include:**

- a minimum of two examples of a learning facilitation relationship being conducted, with different individuals to demonstrate communication skills and flexibility; one or more of the processes / techniques identified must be demonstrated

**Integrated assessment means that:**

- this unit can be assessed alone or as part of an integrated assessment activity involving other relevant units in the TAA04 Training and Assessment Training Package. Suggested units include but are not limited to:
  - TAADEL401A Plan and organise group-based delivery
  - TAADEL402A Facilitate group-based learning
  - TAADEL404A Facilitate work-based learning
  - TAADEL501A Facilitate e-learning.