TAADEL403A Facilitate individual learning

Release: 1
TAADEL403A Facilitate individual learning

Modification History
Not applicable.
Unit Descriptor

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

Competency Field

Delivery and Facilitation

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

Competency Field

Delivery and Facilitation

Application of the Unit

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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.

Application of the Unit
Not applicable.

Licensing/Regulatory Information
Not applicable.

Pre-Requisites
Not applicable.

Employability Skills Information
Not applicable.

Elements and Performance Criteria Pre-Content
Not applicable.

Elements and Performance Criteria

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Identify individual learning facilitation requirements</td>
</tr>
<tr>
<td>1.1</td>
<td>The need for individual learning/facilitation in the learning area is identified</td>
</tr>
<tr>
<td>1.2</td>
<td>The goals for learning for individual learning/facilitation are identified and discussed with relevant persons</td>
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<tr>
<td>1.3</td>
<td>Appropriate individual learning/facilitation techniques and processes are identified and documented to support individual learning needs and goals</td>
</tr>
<tr>
<td>1.4</td>
<td>Evaluation processes are developed and agreed</td>
</tr>
</tbody>
</table>
1.5 Organisational support for implementation is obtained, where relevant

2 Establish the learning/facilitation relationship

2.1 The individual's learning style, learner characteristics and the context for learning are identified

2.2 The appropriate technique/process to facilitate individual learning is selected or organised and the basis of the technique/process is explained and discussed with the individual learner

2.3 The boundaries and expectations of the learning/facilitation relationship are clarified and agreed using effective communication and interpersonal skills

2.4 Any equity or additional support needs are clarified

2.5 An individualised learning plan is developed, documented and discussed with the learner

3 Maintain and develop the learning/facilitation relationship

3.1 Preparation for each meeting/session is evident

3.2 Effective communication and interpersonal skills are used to grow the relationship and sustain active participation

3.3 Structured learning activities are developed to support and reinforce new learning, build on strengths and identify areas for further development

3.4 Leadership and motivational skills are demonstrated to enable the learner to take responsibility for learning

3.5 Learner cues are observed and changes in approach are made, where necessary, to maintain momentum

3.6 Ethical behaviours are practised at all times

3.7 Regular meetings are agreed to by both parties and scheduled to monitor the effectiveness of the learning/facilitation relationship

3.8 Appropriate documentation to support the relationship is mutually developed and maintained
4 Close and evaluate the learning/facilitation relationship

4.1 Tools and signals are used to determine readiness for closure of individual learning/facilitation relationship

4.2 The closure is carried out smoothly using appropriate interpersonal and communication skills

4.3 Feedback is sought from the learner on the outcomes achieved and the value of the relationship

4.4 The impact of the learning/facilitation relationship is reviewed using identified evaluation processes

4.5 Self evaluation and reflection on own performance in managing the relationship is carried out and areas for improvement are identified

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

Required Skills and Knowledge

Not applicable.
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.

Overview of Assessment

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.

Evidence Requirements

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.

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
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**Overview of Assessment**

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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

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**Required skills and attributes include:**

use of empathy to:
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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 Straight 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

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indictative meanings or applications of these requirements in different operating contexts and
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quantifiable measures such as increased productivity/achievement of new skills
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additional time with learner

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activist
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reflective

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language, literacy and numeracy requirements
specific needs, physical or psychological
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level of formal schooling in Australia or overseas
length of time resident in Australia

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determined by the area of learning
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defined by the work/learning activities
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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

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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
confidence
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 Straight Islander support
ethnic support services
interpreting services
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community support

**An individualised learning plan includes:**
the goals to be achieved
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the logistics of the learning relationship, for example:
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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

**Unit Sector(s)**
Not applicable.