TAADEL403B Facilitate individual learning
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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.

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.

Licensing/Regulatory Information
Not applicable.

Pre-Requisites
Not applicable.
**Employability Skills Information**

This unit contains employability skills.

**Elements and Performance Criteria Pre-Content**

Elements describe the essential outcomes of a unit of competency. Performance criteria describe the performance needed to demonstrate achievement of the element. Where **bold italicised** text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

**Elements and Performance Criteria**

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
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<tbody>
<tr>
<td>Element</td>
<td>Performance Criteria</td>
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<tr>
<td>1 Identify individual learning facilitation requirements</td>
<td>1.1 The need for individual learning/facilitation in the learning area is identified</td>
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<td>1.2 The goals for learning for individual learning/facilitation are identified and discussed with relevant persons</td>
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<td>1.3 Appropriate individual learning/facilitation techniques and processes are identified and documented to support individual learning needs and goals</td>
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<td>1.4 Evaluation processes are developed and agreed</td>
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<td>1.5 Organisational support for implementation is obtained, where relevant</td>
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<tr>
<td>2 Establish the learning/facilitation relationship</td>
<td>2.1 The individual's learning style, learner characteristics and the context for learning are identified</td>
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<td>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</td>
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<td>2.3 The boundaries and expectations of the learning/facilitation relationship are clarified and agreed using effective communication and interpersonal skills</td>
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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

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the 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 Guide, Employability
Skills
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:

TAADEL401B Plan and organise group-based delivery
TAADEL402B Facilitate group-based learning
TAADEL404B Facilitate work-based learning
TAADEL501B Facilitate e-learning.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. **Bold italicised** wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

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 areas 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
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.

Competency Field
Delivery and Facilitation