

TAADEL502A

Unit Descriptor

Application of the Unit

Facilitate action learning projects

This unit specifies the competency required to facilitate a group to engage in action learning projects.

Action learning involves a group-based learning model in which the participants contribute their knowledge and expertise to guide the learning experience. The members learn from each other and through their experiences in participating in and directing the action learning process, guided by the trainer/facilitator.

- The group may have come together for a number of reasons. They may be an existing work team or group; a class group; a network or community of practice; or a group brought together to work through a specific project, activity, issue or common interest. Action learning can be integrated into work and contribute to improvements at work.
- Facilitating an action learning project requires high-level communication, interpersonal and leadership skills to continuously develop, monitor and evaluate the relevance, group interactions, structure and pace, and learning/work outcomes of the process. These skills are simultaneously used with the learners.
- This unit is related to a number of training and management work functions. For example, a trainer/facilitator may use action learning facilitation skills as part of a broader training delivery strategy, or as a process for professional development with peers and colleagues, while a manager may facilitate an action learning project to achieve organisational objectives, such as a change process.
- The competency specified in this unit is typically required by trainers/facilitators, teachers, coordinators/managers and consultants.

Unit Sector

Delivery and Facilitation

ELEMENT

PERFORMANCE CRITERIA

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| 1. Prepare for action learning | 1.1 The <i>needs of the organisation</i> and the learners are <i>researched</i> and confirmed
1.2 A <i>facilitation guide</i> is developed with <i>stakeholders</i>
1.3 Resources which engender a work-based action learning approach are researched and collated
1.4 Information about the action learning process is distributed to all learners in the group |
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| 2. Introduce action learning | <p>2.1 <i>An environment conducive to collaboration and safety is set up</i></p> <p>2.2 Communication and interpersonal skills are used to welcome and engage the group</p> <p>2.3 The expectations, knowledge and expertise of individuals in the group are identified and acknowledged</p> <p>2.4 The principles of action learning are explained and discussed</p> <p>2.5 Anticipated objectives, outputs and outcomes, and evaluation methods are clarified and confirmed</p> <p>2.6 Resources are introduced and discussed</p> |
| 3. Facilitate action learning | <p>3.1 The group is guided to jointly develop and document an action plan, and modify as required</p> <p>3.2 Sessions are timetabled and varied activities are paced to suit the learning needs and learning styles of the participants and to maximise participation and engagement</p> <p>3.3 Generic skill development is encouraged through facilitated learning</p> <p>3.4 The strengths and relationships within the group are observed and extended to drive the learning experience and to maintain group dynamics</p> <p>3.5 Problem solving, contingency management and time management skills and strategies are used to address issues as they arise</p> <p>3.6 Information to assist with out of session implementation of action learning is distributed and discussed</p> |
| 4. Continuously evaluate action learning | <p>4.1 The effectiveness of communication within the group is discussed and evaluated</p> <p>4.2 Learners are supported to self-assess and reflect on personal and group learning</p> <p>4.3 A range of evaluation methods is used to periodically evaluate and document progress against the objectives/intended outcomes of the facilitation guide</p> <p>4.4 Ongoing evaluations and reflections are synthesised and used to continuously modify or adapt action learning process and individual/group activities, as required</p> |
| 5. Identify ongoing group purpose and sustainability | <p>5.1 Learners are supported and encouraged to determine agreed directions and future of the group</p> <p>5.2 Guidance is provided to address group deliberations</p> <p>5.3 The agreed directions and outcomes are defined</p> |
| 6. Facilitate group evaluation | <p>6.1 The group's overall evaluation of the action learning process is facilitated against the action plan in line with the agreed evaluation process</p> <p>6.2 The group evaluation is documented and agreed by the group</p> <p>6.3 The group is supported to promote and disseminate outcomes and any outputs/products, as appropriate</p> <p>6.4 All documentation in relation to the action learning project is filed according to organisational requirements</p> |

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| 7. Reflect on personal facilitation skills | 7.1 Feedback from the action learning group and other stakeholders is gathered and analysed
7.2 Self-assessment and reflection is carried out to evaluate own performance
7.3 Feedback on personal facilitation skills is sought from colleagues or other relevant persons
7.4 Feedback is synthesised to determine improvements for future action learning facilitation |
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KEY COMPETENCIES

Key Competency	Example of Application	Performance Level
Communicating ideas and information	writing legibly providing constructive feedback reiterating information using question and answer listening attentively using other communication skills as identified above	3
Collecting analysing and organising information	gathering information about the group collecting information throughout the session and using it when relevant to the session analysing information to continuously evaluate the sessions with the group reflecting on own performance and documenting outcomes	3
Planning and organising activities	planning the entire facilitation session planning and developing activities to be used through the session organising the group for different activities	3
Working with others and in teams	monitoring group dynamics ensuring fairness and equity in the group keeping self out of the centre of the group	3
Using mathematical ideas and techniques	maintaining time management	1
Solving problems	solving problems that may arise within the group through disagreement or barriers	3
Using technology	using computer equipment, audio-visual equipment and overhead projectors, as appropriate	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.

Needs of the organisation and the learners may include:

- implementing relevant aspects of the organisation's strategic or business plans
- developing/implementing/embedding new ways of working/improved work practices
- addressing change/developing change management approaches
- increasing team capacity and empowerment
- developing a learning organisation
- educational background and experience in learning
- preferred learning styles
- specific needs for learning

Research may be undertaken through gathering/reviewing/investigating:

- employment records/performance reviews/supervisors' reports
- organisational goals, reports and plans
- client feedback
- external reports on policies, changing nature of work and new technologies that impact on work
- learner records and information
- issues/areas of need, as discussed with internal/external peers, colleagues and work personnel

A facilitation guide:

- must outline the action learning methodology to be used
- must outline intended objective outcomes, outputs, time lines, budget, and evaluation and promotional strategies
- must identify the needs, interests and expectations of potential learners/group members
- must include proposed evaluation methods
- may require modification following research, feedback and implementation by the group members
- may include assessment criteria
- may be developed by the trainer/facilitator
- may be developed in collaboration with others, e.g. stakeholders/peers/mentors

Stakeholders include:

- persons, other than the learners in the group, influenced by the action learning process, such as:
 - management
 - other employees/workers
 - colleagues
 - other learners
 - clients
 - enterprise/industry partners

Resources may include:	• identified experts, internal/external • publications/reports • organisational documents • communication tools • flip chart, white board or overhead projector • location/facility requirements • travel/accommodation/meeting needs
Action learning process may involve:	• work-based learning • action research • communities of practice • structure or formal networks • situated learning • self-defined or self-managed groups
An environment conducive to collaboration and safety includes one where:	• equipment works correctly • occupational health and safety (OHS) requirements are met • the venue is welcoming and comfortable • organisational support is obtained • behavioural norms are established
Communication skills must include:	• providing an open, warm communication style where effective verbal and body language is used • demonstrating a capacity to communicate clearly to facilitate the group and each individual • using critical listening and questioning techniques • providing constructive and supportive feedback • accurately interpreting verbal messages • assisting participants to paraphrase advice/instructions to the trainer/facilitator • providing clear and concrete options/advice
Interpersonal skills must include:	• showing respect for learners' expertise/background • demonstrating sensitivity to diversity, disability, culture, gender and ethnic backgrounds • modelling facilitation and learning behaviours • engaging in two-way interaction • using language and concepts appropriate to cultural differences • accurately interpreting non-verbal messages

Principles of action learning include:

- a learning cycle based on planning, action, reflection and evaluation
- work-focused
- learning by doing and through action
- learner-directed
- based on mutual expertise, support and stimulation
- open ended solutions
- using learning to act differently
- challenging established models and approaches
- thinking critically

The action plan may include:

- the organisational context and objectives
- the action learning methodology being used
- expected outcomes/outputs
- formal learning and work activities
- time lines and number of meetings/sessions
- resources
- agreed evaluation methods

Varied activities may include:

- guiding learners to share their knowledge and expertise
- encouraging critical analyses of practices
- developing common resources/responses/strategies
- using group engagement activities, e.g. problem solving, scenario setting and questioning
- trialling ideas or processes
- reporting on tasks/activities undertaken in the workplace or out of sessions
- using a range of different activities, for example:
 - written activities
 - role-plays
 - audio or visual activities
 - practice or demonstration
 - visits to other organisations, training and/or assessment organisations, worksites

Learning styles include:

- theorist
- pragmatist
- activist
- reflector
- kinaesthetic
- auditory
- visual

Generic skills may include:

- Key Competencies, including:
 - communicating ideas and information
 - collecting, analysing and organising information
 - planning and organising activities
 - working in a team
 - using mathematical ideas and techniques
 - solving problems
 - using technology
- self-management
- how to learn
- initiative and enterprise
- innovation
- language, literacy and numeracy skills

Self-assess and reflect may include:

- asking critical questions about personal performance and answering them objectively and honestly
- analysing what worked and what did not work, and why
- thinking about and planning for improvement in the future

Evaluation methods may include:

- formal methods such as surveys and questionnaires
- informal methods such as observations, individual and group questioning and discussions
- journal/diary
- feedback loops

Agreed directions and future may include:

- identifying areas of further group work
- bringing project or group to a close
- developing new directions

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 apply organisational, communication, interpersonal and group leadership skills to effectively facilitate a group action learning project.

The trainer/facilitator must demonstrate the ability to engage and motivate the group using a variety of activities, processes or techniques to maintain the interest of all individuals. The trainer/facilitator must also demonstrate the ability to ensure all group members feel able to contribute equally and are able to mutually determine their own direction and outcomes within the parameters set by the work objectives.

The trainer/facilitator must maintain relevance of the group discussion and learning to the purpose of the action learning, and assist the group members to learn from each other and their experiences.

Required knowledge includes:

- 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
 - adults need to be respected
 - adults prefer learning to be relevant and practical
- action learning principles, for example:
 - a learning cycle based on planning, action, reflection and evaluation
 - work-focused
 - learner-directed
 - based on mutual expertise, support and stimulation
 - open ended solutions
 - using learning to act differently
 - challenging established models and approaches
 - thinking critically
- current and emerging workplace action learning approaches, for example:
 - communities of practice
 - action research
 - structured networks
 - knowledge management theory and practices
- group learning dynamics, for example:
 - degrees of structure and formality
 - forming, storming, norming, performing and terminating
 - stages of development - potential, coalescing, active, dispersed, memorable
- different learning styles and how to encourage and cater for them, for example:
 - theoretical learners
 - pragmatic learners

- active learners
- reflective learners
- kinaesthetic learners
- audio learners
- visual learners
- different learning modes or devices, for example:
 - audio-visual technology
 - written information
 - demonstrations
 - practice opportunities
 - group work
- context in which the action learning is taking place, for example:
 - the organisation/industry
 - the site
 - relevant resources, organisational documents, internal/external policies/strategies/reports
- change management models
- evaluation and reflection methods for groups and individuals and their different purposes/outcomes
- relevant policy, legislation, codes of practice and national standards including Commonwealth and state/territory legislation, for example:
 - ensuring fairness of learning opportunities
 - industrial relations award and other possible barriers to learning competency standards
 - licensing
 - industry/workplace requirements
 - duty of care
 - 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:

- competent use of required technology, for example:
 - computers
 - audio-visual equipment
 - electronic whiteboard
- literacy skills to:
 - write legibly and clearly
 - develop a facilitation plan
- language skills to:
 - effectively hypothesise, plan and influence others
 - interpret the verbal and non-verbal communication of learners, for example, resistance/reluctance, uncertainty, enthusiasm, confusion and body language
- communication and interpersonal skills to:
 - demonstrate an open, respectful, friendly, welcoming attitude
 - demonstrate empathy
 - make people feel safe and at ease
 - encourage learners to succeed at their tasks
 - provide positive and negative feedback
 - explore ideas in discussion by building on others' ideas to advance discussion, and questioning others to clarify
 - acknowledge contribution of each group member
 - anticipate the direction of conversation and guide it to maintain relevance
 - listen effectively to identify emerging themes/issues/ideas; reiterate and paraphrase information; check for meaning and attitude
- group management skills to:
 - guide group dynamics and ensure fair distribution of comment and participation
 - remain non-judgemental
 - work with conflict
 - remain objective
 - set up boundaries
 - respect physical space
 - maintain enthusiasm and energy
 - manage time
 - keep sessions learner-centred
 - manage inappropriate behaviour
- problem solving skills to:
 - address individual and group difficulties and issues relating to the action learning process
 - maintain group cohesion and direction
 - address contingencies in sessions
 - modify scope/direction/outcomes of the action learning process

Products that could be used as evidence include:

- documentation developed during facilitation
- evaluation information from participants
- activities or resources developed for a range of sessions
- facilitation plans
- action plans
- peer assessment documents
- audio/video of session
- self-reflection diary/journal
- journals and notes of learners, within confidentiality requirements

Processes that could be used as evidence include:

- how group dynamics were maintained and why
- how the learners directed the process
- how communication skills were used effectively in the session
- how learning principles were applied

Resource implications for assessment include:

- relevant workplace project or activity
- sufficient time with the group for completion of action learning process and cycle

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 action learning cycles with different briefs or project outcomes that enable the outcomes, Performance Criteria, knowledge and skills to be demonstrated

Integrated assessment means that:

- this unit can be assessed alone or as part of an integrated assessment activity involving 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
 - TAADEL403A Facilitate individual learning
 - TAADEL404A Facilitate work-based learning
 - TAATAS504A Facilitate group processes.