Toolkit

A TOOLKIT FOR TRAINING VOLUNTEERS (PART B)

For trainers, managers of volunteers and volunteer-involving organisations.

national volunteer skills centre | volunteering australia

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In recent times formal training for volunteers has begun to assume special importance, both as a volunteering role requirement and as a motivation to volunteer. A trainer of volunteers not only facilitates competency strengthening but also contributes to motivating volunteers by helping them to achieve and maintain satisfaction in their roles.

The volunteering environment is characterised today by legislative, quality assurance and continuous improvement requirements. There are also service delivery obligations attached to funding. The competency and commitment of volunteers are pivotal to meeting these requirements.

A volunteer who is competent in their role – well-trained – will have more reason to continue volunteering than one who is not confident and under stress because they lack competence. Making the most of what volunteers know and can do has obvious benefits for both volunteers and volunteer-involving organisations. Accordingly, a trainer who supports the volunteer in achieving competence and confidence is a key contributor to volunteering in Australia. This toolkit, together with the Guide for Training Volunteers (Part A), is offered as a resource to assist this important process.

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Lewis Hughes is the principal of the *Enviro-sys* learning and resource management consultancy. He has a focus upon *making the most of what people know and can do* in a manner that yields advantage to the individual, the organisation and/or the environment, and the community. And, consequent upon the introduction of Training Packages to Australian vocational education and training, Lewis is a member of the Department of Education, Science and Training (DEST) quality assurance consultant panel in respect of Training Package support materials.

Lewis's professional background encompasses mathematics and science teaching, adult education and training, organisational development, factory management, marketing management, financial institution management, international trade, public relations, professional institution management, and consulting with a particular emphasis upon learning.

Lewis's professional commitment to learning is evidenced by 1971 Foundation Membership of the Australian Institute of Training and Development (AITD) – of which he is a past Victorian and National President. Lewis is a Fellow and Life Member of the AITD.

From a volunteering perspective, Lewis has had a continuing engagement through contributions to student associations, professional institutions, industry associations and co-operative recreation bodies. And he is presently in the closing stages of writing a PhD thesis drawing upon his research in recent years into the relationship between making the most of what Country Fire Authority volunteer members know and can do and retaining them as volunteers. His PhD candidature, at Deakin University, follows achieving a Masters Degree in Professional and Vocational Education and Training.

WELCOME TO THE TOOLKIT FOR TRAINING VOLUNTEERS (PART B)

This toolkit is one half of a resource which assists trainers of volunteers to achieve best practice in the design and delivery of training. It should be read in conjunction with the *Guide for Training Volunteers (Part A)*.

This toolkit (Part B) builds upon the learning environment issues that are reviewed in the *Guide for Training Volunteers* and contains tools for a competency-based approach to training volunteers. It should be noted that although the tools in Part B are orientated towards competency-based training in the Training Package environment, the underlying principles are appropriate for broad application. We recognise that as a facilitator of learning you are engaged in an activity that cannot be reduced to a one-size-fits-all model. Accordingly, the information and tools in these resources are offered for you to reflect on, and take up in a manner that bests suits you and the changing environment in which you facilitate learning.

Who is a 'trainer' and how can you use this guide?

In this toolkit, a 'trainer' can range from a person who is sometimes a trainer and may not have trainer qualifications, through to a person in the formal role of trainer and with formal qualifications. Of course, there are many variations in between, embracing both paid staff and volunteer trainers. An experienced volunteer may also be part of a learning partnership in which they act as a training supporter rather than principal trainer. Taking on the role of buddy or coach to assist the learner is an example of this.

This toolkit is aimed at four principal audiences:

- Designated trainers of volunteers – this means that training is a significant part of your role. The approaches and tools presented here are offered as a bench-marking reference point and/or a beginning point for developing and implementing systems and techniques which suit your volunteering environment.
- Occasional trainers of volunteers – this means that your major duties are other than training, but you do facilitate training which may have been identified as appropriate and designed by others. The approaches and tools presented here are offered as a resource for you to draw on from time to time to refresh your understanding and enhance your facilitation of learning.
- Training supporters – this means that you assist trainees to learn by being a buddy or coach. The approaches and tools presented here are offered as reflective tools which you can draw on to strengthen your understanding of training principles and techniques in a manner which helps you to better support the learner.
- Managers and team leaders of volunteers who contribute to the identification of training needs, the design of training programs and support the delivery of training. The approaches and tools presented here are a resource for you to draw on as required, to assist you make your contribution.

No matter which of the above roles you undertake, the resources in both the Toolkit (Part B) and the *Guide for Training Volunteers (Part A)* have a place within your self-directed professional development activities. As someone who supports volunteers to make the most of what they know and can do, your professional development is important as you make a direct contribution to building a volunteer-involving organisation's capacity.

What do you need to qualify formally as a trainer?

Many trainers in the volunteering environment will be facilitating training on an occasional basis and as part of other duties. The need to have formal qualifications as a trainer is unlikely to apply, however you may be increasingly working in partnership with qualified trainers from Registered Training Organisations (RTOs). If you wish to deliver accredited training you will need a formal qualification known as *Certificate IV in Training and Assessment*. Professional trainers will be aware of the increasing requirement for formal qualifications and that, in 2005, TAA40104 *Certificate IV in Training and Assessment* superseded BSZ40198 *Certificate IV in Assessment and Workplace Training*. Accordingly, this toolkit and the accompanying *Guide for Training Volunteers (Part A)* takes the opportunity to introduce some of the TAA40104 content to lay some groundwork for those who are considering achieving formal qualification, and for the general interest of those not intending to proceed to formal qualifications. You may find that these two resources help you to start gathering evidence of your competencies as a trainer, which you may be able to use to apply for Recognition of Prior Learning (RPL). For further details, see Appendix to this toolkit (a separate PDF), and another resource produced under the NVSC Project, *Recognition of Prior Learning Toolkit*, both available free from the Volunteering Australia website.

Throughout this toolkit the terms **'training'** and **'learning'** are used interchangeably, as are 'trainee' and 'learner'. This is an attempt to break down the notion that a training pathway to new knowledge and skills is different to a learning pathway. There are many potential pathways to acquiring new competencies and, whether these are called 'training' or 'learning', the outcome is the same. However, the term 'learner' is arguably more empowering than 'trainee' and better reflects the values of volunteering.

You will also find that **active learning** is a repeated theme. Training programs can often be designed and delivered with more of a focus on what the trainer does than what the trainee does. In the past it was not uncommon to come across lesson/training plans expressed in terms of topic content and time allocation by the trainer – clearly not a focus on the learner. This toolkit advocates and supports a design and delivery strategy which is focused on the learner being consciously aware of the value to them – and others – of the training/learning experience, and on the importance of them being an active participant (doing something). Sitting passively, listening to a trainer is not a learning experience, and it does not make the most of what a learner knows and can do.

Throughout the toolkit this *brightening the insight* icon announces a suggestion that you may *choose* to take up to explore the issues more deeply. The generic approach of this toolkit can serve as the basis for you to explore and think about *facilitating learning* in your environment. Encouraging your trainees to be active learners is a best practice strategy, and reaching beyond the information presented in the toolkit is a way for you to model *active learning*.

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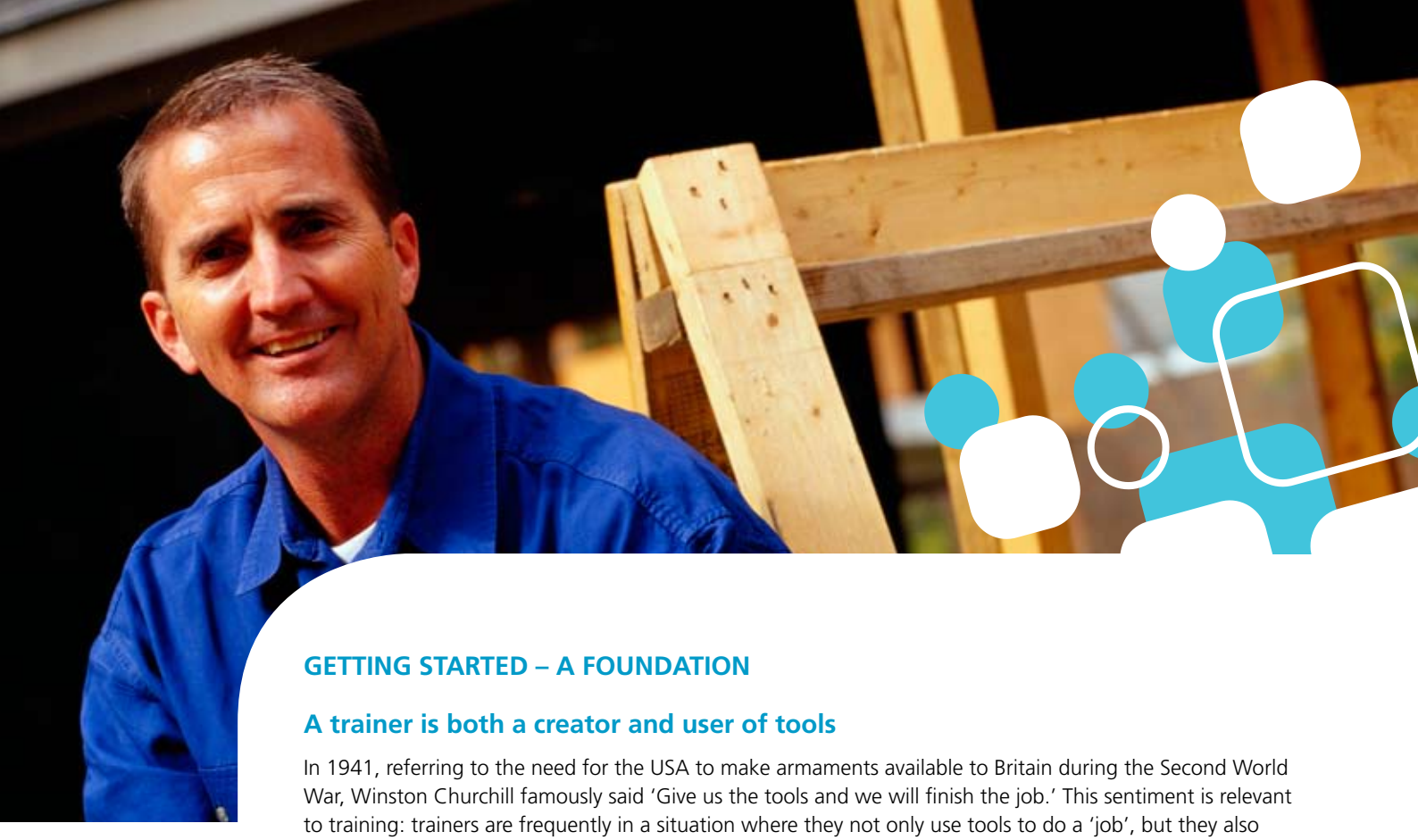


GETTING STARTED – A FOUNDATION

A trainer is both a creator and user of tools

In 1941, referring to the need for the USA to make armaments available to Britain during the Second World War, Winston Churchill famously said 'Give us the tools and we will finish the job.' This sentiment is relevant to training: trainers are frequently in a situation where they not only use tools to do a 'job', but they also design and construct these tools. Trainers might instead say, 'Give us the authority and confidence of insight and we will create the tools that support learning.'

This toolkit (Part B) offers tools that an empowered trainer can build on to design training to suit their specific circumstances.

Why 'empowered trainer'?

The use of the term 'empowered trainer' is very deliberate. The trainer faces variables so diverse that being highly prescriptive about learning/training tools is not helpful. In addition to the diversity of learners and their needs, the very nature of the trainer – their role, responsibility and capability – can vary greatly. The trainer needs to be confident that they can help identify learning needs and opportunities, construct appropriate learning pathways and tools (suited to the learners), and effectively evaluate the outcomes. And, of course, the trainer must have adequate authority (within the scope of their role) to act in response to the need and to seize an opportunity.

B1.1 Working out your role and your approach

In the volunteering environment (but not only in that environment) a person taking on the trainer role may be a designated trainer or may take on this function occasionally as part of another role.

You may be

- a designated trainer on a full-time or part-time basis;
- a designated trainer primarily engaged in identifying needs and designing learning;
- a designated trainer who is primarily engaged in facilitating learning which has been designed by others;
- a manager of a team of trainers;
- a manager or team leader who occasionally designs and/or conducts training;
- a designated training supporter who helps colleagues acquire the skills and knowledge they need to undertake their task.

And, of course, it is always important to remember that of all the people who contribute to learning within volunteer-involving organisations, the learner is the central player. It is the learner, after all, who undertakes activities to develop their competence and then applies this learning within the organisation.

This list is representative of who might play some role in the training of volunteers, but is only a starting point for how *you* might (in various ways, from time to time, and in association with others) make a contribution.

Also, it is worth bearing in mind that in organisations that value learning, the training environment is a dynamic one – some may prefer to call it organic, as it is a growing thing. While many individuals have organisational roles that don't at first sight appear to be involved with learning/training, they have the capacity and opportunity to have input into the learning process. For example, a senior manager may be well placed to make a contribution to the development of a learning tool that will assist all volunteers in adapting to a new legislative environment. Or, an experienced volunteer assigned the role of learning buddy to a new volunteer may be the first to become sensitive to a broad training need across the cohort of recently joined volunteers. And, the newest of volunteers may have something to contribute because they see the organisation with fresh eyes.

Template 1 outlines the elements of the training process and may help you locate yourself within it.

Template 1 *Elements of the training process and personal contribution*

Elements in the construction and delivery of a training program	**Ways in which you may contribute from time to time**
Identifying training need relevant to achieving organisational goals *(Or, in some instances , it may be better to think of it as a training opportunity)*	*Whatever your primary role, being alert to these elements will open up opportunities for you to contribute to training in a way that is supportive of others and not intrusive. That is why this trainer's guide is written to be inclusive of all. Take from it what is of interest at any particular time.*
Specifying the required competencies *(Defining the required learning outcomes)*	
Learning design *(Creating flexible approaches to the learning)*	
Identifying resources and developing resources *(In some instances, these resources may be people who can tell of their experiences or contribute in other ways)*	
Planning to delivery training *(The who, what, where, when and how)*	
Recruiting trainees to the program *(Identifying, informing and encouraging participation)*	
Delivering/facilitating the training *(Contributing to facilitation as appropriate to your role. And with transfer of the learning outcomes to the workplace in mind)*	
Motivating trainees to persist with the program *(Giving feedback and applauding achievement)*	
Assessment of competency achieved *(Sensitively approached, as some trainees may be threatened by this)*	
Evaluating the efficacy of the program *(Continuous improvement review)*	

Whatever your particular role, avoiding a *one-size-fits-all* approach when developing and using training tools is essential. This holds true for both the trainee and the trainer. While we understand that not all trainees learn in the same way, it is less acknowledged that trainers tend each to have a style that suits them. You may have experienced a situation where modelling your approach on that of another trainer with a different background, personality, and set of skills was disastrous.

Given the breadth and depth of training tools, and the range of people who develop and draw on them, you may find it helpful to use the framework of Figure 1 as a generic foundation for planning your approach to training, no matter what your role. Other tools and more details are provided throughout this guide to help you use this framework effectively.

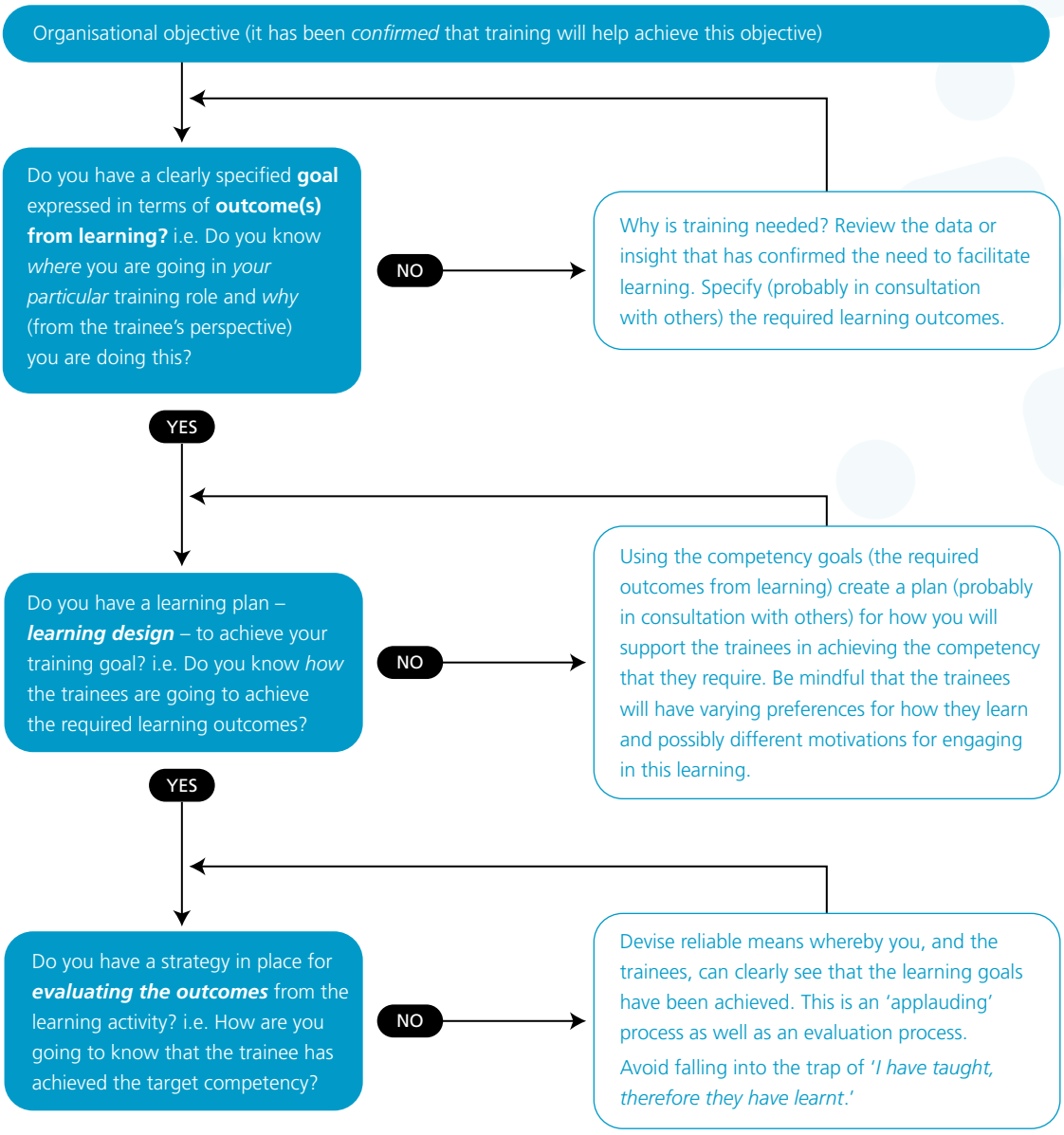


Figure 1 *The three foundation essentials for effective delivery of training*

Acknowledgment: The 'Where am I going, how shall I get there, and how will I know I have arrived' core of Figure 1 is derived from *Developing Attitude Toward Learning* by Robert Mager (1968). This and other texts written by Mager are highly inspirational.

Each element in the framework in Figure 1 should be looked at from the perspective of your particular role. However, you will almost always be in some form of partnership with others and, for this reason, 'consultation with others' is indicated as a likely requirement.

Three examples:

If you are acting in the role of training supporter (buddy) for another volunteer, you will probably work out between you a way in which this works best. However, to be of real assistance to your colleague you need to be working to a plan within a plan. You need to have a clearly defined objective that is expressed in terms of learning outcomes and consistent with the overall training program. You need to know what partnering processes you and your colleague are going to draw on, and then both of you need to have a shared understanding of how you will recognise when the learning outcomes have been achieved.

If you are a senior full-time trainer with the authority to design and deliver training, you will have consulted with a broad spectrum of stakeholders to identify need and plan accordingly.

If you are a manager with ultimate responsibility for volunteer competency, but you are not directly involved with the design and delivery of training, you will still have worked closely with your training team as they applied the processes outlined in Figure 1.

In summary, Figure 1 illustrates a training design (planning) framework which is relevant to the range of roles involved in supporting trainees to learn. This process begins with identifying the need, goes on to setting the goal, then to planning the 'how', and culminates with confirming that the goal has been achieved. And, importantly, it is inherent in this approach that the trainer (in whatever role) is valued and thus empowered to make a planning contribution appropriate to their role.

DECIDING *IF* TRAINING IS NEEDED, AND *WHAT KIND* OF TRAINING IS NEEDED

B2.1 Training is not always the solution to a performance problem

Overwhelmingly, volunteer-involving organisations have always highly valued their volunteers and operated on the basis that people are their major asset. However, volunteer-involving organisations are as susceptible as any other organisation to turning to training to address a performance problem when the solution actually lies elsewhere.

In *Analyzing Performance Problems*, Mager and Pipe (1970) provide a very concise overview of the questions to ask and the actions to take, to ensure that training is provided only when appropriate. This approach is encapsulated in Template 2.

Template 2 *Confirming that training is appropriate*

Item for consideration	Comments and action by you
What is the volunteer performance objective or discrepancy? And why is it sufficiently important to take action? *Note: Some situations may not be important enough to justify a huge training effort. There might be a very simple quick fix such as just talking about the objective or reason for concern.*	
Can the volunteer(s) performance issue be best addressed by training? Why do you believe that is the appropriate approach? *Note: Adequate competency may exist but the motivation to apply it is lacking, or there may be obstacles standing in the way of drawing on existing competency. Not having the correct equipment or resources, or not having enough time, or just not feeling valued, are examples of possible obstacles.*	
Does (or will) the volunteer(s) recognise the importance of applying their knowledge and skill to the task at hand? *Note: Volunteers may not understand the full importance of drawing on their knowledge and skill – and may even under-value what they know. This might be the reason for a current discrepancy in performance or for only partial application of competency following training.*	
If you have confirmed that training is the appropriate approach to overcoming a performance deficiency or if you are preparing to meet new demands, consider whether refresher training is all that is required. *Note: Maintaining competency can be a major issue where the volunteer does not regularly call on this competency. Giving a volunteer feedback may be the key to maintaining the desired level of performance. Or a volunteer may think that they are doing a good job, but this is not the case, and nobody has sensitively told them so.*	
Where a formal training program to build new competency is appropriate, what are the learning outcome objectives (target competencies)? What is the intended learning pathway (with adequate flexibility for learners to learn in the way that best suits them)? And how are you going to assess that the target competencies have been achieved? *Note: Even where you are not the principal designer or facilitator of the learning – e.g. you are delivering only part of the training or acting as a buddy – it is appropriate for you to think and act in this way about your contribution,* ***but in consultation with your facilitating colleagues.***	

In addition to drawing on Template 2 to implement a training strategy, this approach can also help you to involve others in making a contribution to broader goal setting and action in your organisation. By engaging your volunteering colleagues in the processes described in Template 2 you will bring them into contact with ideas that nurture a culture in which all see themselves connected to valuing, facilitating and actively learning in a way that strengthens organisational capability.

The quality of outcomes from training in a volunteer-involving organisation is significantly influenced by the degree to which learning is valued by:

- those who set the goals of the organisation;
- those who are the stakeholders in organisational performance (internal and external to the organisation);
- those who plan and deliver training; and
- those who are participants in the training.

This is probably not a lot different from other organisations, except that in the case of volunteer-involving organisations there is a much greater 'voluntary' element influencing the outcomes. It is much easier for a volunteer to withdraw (or reduce) their service if they are not motivated to engage in the required learning. For these reasons, how soundly you plan and facilitate training is especially influential in a volunteer-involving organisation. You need to get everyone on side – everyone (trainees and other stakeholders) need to recognise and value what 'training' can do for them.

Think about how the traditional formula for a business return on investments (ROI)

$$\text{Percentage ROI} = \frac{\text{Net benefits (\$)}}{\text{Total costs (\$)}} \times 100$$

might be applied in respect of training inputs and outcomes in your volunteering environment. It may be appropriate to think beyond dollar value as the inputs and outputs, and also to contemplate how different stakeholders might construct this formula. For a particular volunteer, for example, inputs may be time and commitment, and the return may be satisfaction in having contributed to others. Alternatively, the return may be building new skills which provide new career opportunities.

Reflecting on this may yield interesting propositions for your colleagues to consider and may strengthen the case for appropriate resources to be applied to training, especially if it can be shown that in an environment of scarce funds, training will save money which can then be applied to client service. (A useful text – although focused on training in environments other than volunteering – is *Understanding the Basics of Return on Investment in Training – Assessing the Tangible and Intangible Benefits*, by Patricia Pulliam Phillips (2002).)

B2.2 Conducting a training needs analysis (TNA)

Although Figure 2 may appear, in some respects, to duplicate Figure 1 and Template 2, it is a more conventional way of illustrating the process of identifying a training need and planning to meet it. This process is often called a training needs analysis (TNA).

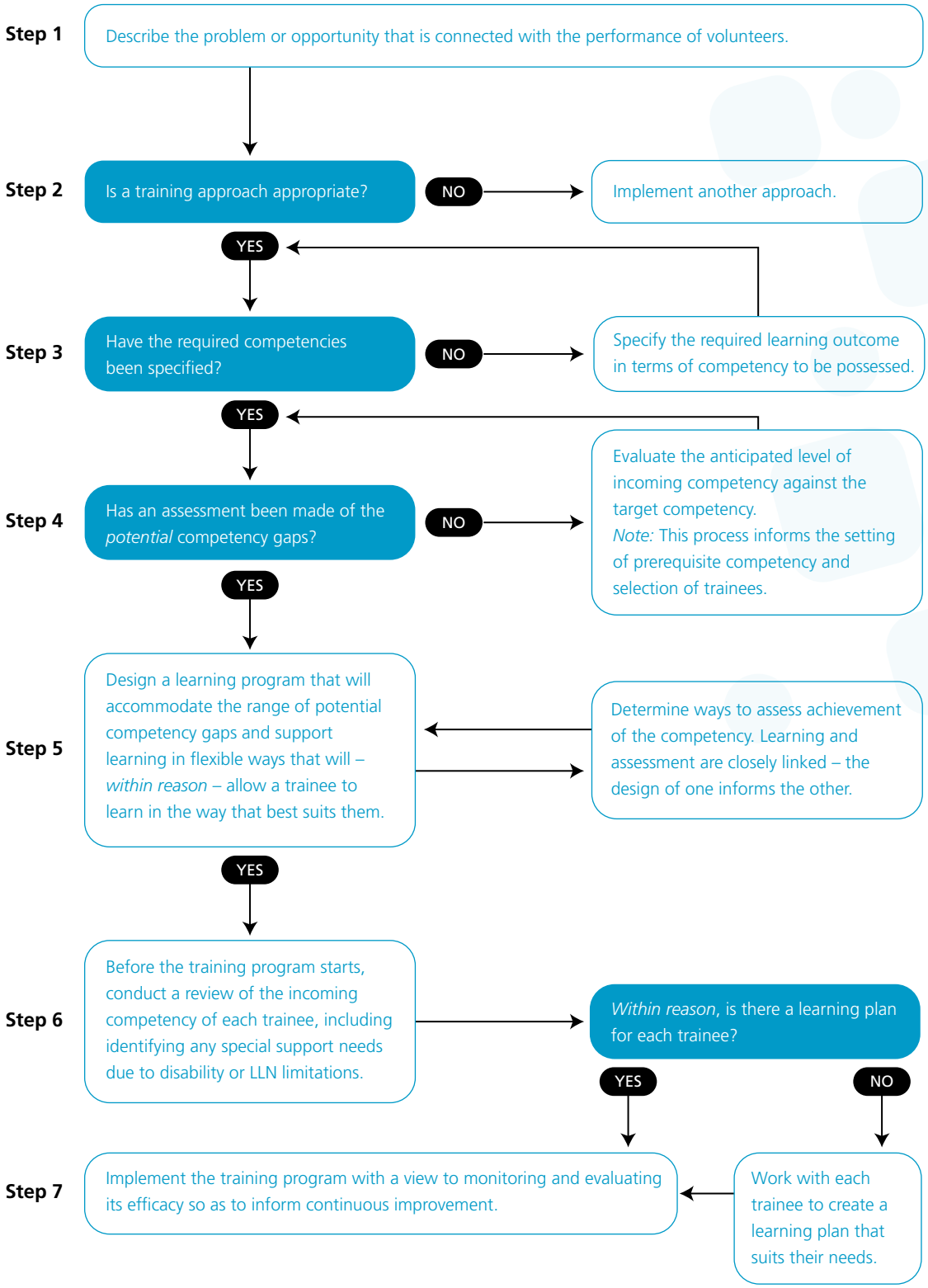


Figure 2 *An approach to training needs analysis*

The seven steps of an approach to TNA, as shown in Figure 2, are:

Step 1 Describe the problem or opportunity

In the case of volunteering, trainees bring varying blends of technical expertise and other life skills to their role. They also have personal expectations of what they will achieve through volunteering. As a result, identifying performance-related problems (things to be fixed) and opportunities (building on current strengths) has many facets.[1] For example, a volunteer may sometimes offer a high level of technical expertise, but have little understanding of how best to apply this in the particular volunteering role. Or alternatively, a volunteer may be highly attuned to the volunteering environment, but find that they need new (or enhanced) technical expertise.

A volunteer-involving organisation has service delivery obligations to its clients, and it is these which shape how it acts on problems and opportunities. However, a volunteer-involving organisation must also consider why its volunteers join and remain. These motivations are not usually the same as the motivations to take up and remain in a conventional job – a volunteer is much more in control of what they do and what they are motivated to learn. Accordingly, organisations also need to take volunteer motivations into account when acting on problems and opportunities.

Step 2 Confirm that training is appropriate

Ensuring that training is not initiated if it is not appropriate is very important to maintaining the integrity of training. From a volunteer-involving organisation's perspective, a misdirected training strategy:

- wastes scarce resources (including a volunteer's time);
- results in failure to address the problem or act on the opportunity; and
- may be very damaging to internal morale and external image.

From the trainee's perspective it is frustrating and undermines motivation if the trainee is obliged to participate in training without good reason. And, of course, from the trainer's perspective, the perception (by others) of having failed is damaging to self and to the status of the role.

Mager and Pipe (1970) make the points that in some instances:

- a person might choose to perform below their capability because they are seeking to avoid having to do the task – e.g. a person in share accommodation might deliberately do a poor job of washing the dishes so as to avoid the task in the future;
- a person might perform below capability because there is a reward from doing so – e.g. a person might get attention from behaving badly;
- a person might not get reward from capable performance – e.g. if those who do their job very well are not valued more highly than those who just turn up, they wonder why they should put in the effort;
- a person might be performing below their capability because there are obstacles in their way – e.g. not having sufficient authority, not having appropriate resources, others working against them, or just not knowing what is expected of them.

The Mager and Pipe (1970) solution to these problems is a combination of appropriate motivation and attention to obstacles. Training is not the solution because the problems are not related to the knowledge and skill possessed – enhancing knowledge and skill won't fix the problem.

[1] A distinction is made here between 'needs' and 'opportunities' to overcome the perception that TNA is only about attending to performances that are below expectations. TNA is as much about moving on by expanding performance capabilities – to act upon opportunities – as it is about fixing things up.

Step 3 Specify the competencies

Where a training solution is appropriate, the beginning point is knowing where you are going – i.e. identifying and describing the knowledge and skill that a person performing the role requires. Although you will often have to analyse the knowledge and skill requirements yourself[2], becoming familiar overall with how units of competency are constructed for Training Packages will be helpful. It is recommended that you access the *Training Package Development Handbook* (DEST 2005) via the Department of Education, Science and Technology homepage – www.dest.gov.au . Pages 104 to 128 provide a very thorough overview, generally applicable to volunteering, of the process of specifying competencies.

Step 4 Identify the potential competency gaps

When you are preparing to start a learning design after exploring the competencies, you will have (or should have) achieved some idea of what competencies your target group of trainees already possesses – i.e. the typical competency base on which you now expect to build. While your trainees will each come to the training activity with their own individual levels of incoming competency – and consequent competency gap – it is helpful to have some overall understanding of the profile of the 'typical' target trainee. This will guide your learning design. Knowing your starting point is as important as knowing your arrival goal. This also assists with recruitment into the training program through targeting potential trainees with the appropriate prerequisites.

The process of identifying potential competency gaps may lead to designing/offering training programs in a streamed manner. This could involve assembling relatively homogeneous groups of trainees, ranging from those with minimal, initial competencies through to those with advanced competencies, who then undertake a bridging program rather than the full program.

Step 5 Design the learning program

It is helpful to keep in mind that learning design is about constructing activities that the learner engages with in a way that suits their learning preferences. The learner may not be aware of their preferences – they may never have realised that they learn in multiple ways and that some ways suit them better than others. This is a topic about which much has been written in recent years, and for which there are numerous theories of varying complexity. However, much of the thinking can be summarised as follows:

- some people learn best by seeing things (visual learners);
- others learn best by hearing and listening (auditory learners); and
- others learn best by getting hold of things – touching and doing – (kinaesthetic and tactile learners).

And, of course, many people combine these approaches in varying ways.

If you are not already familiar with these notions, or wish to revisit and expand your familiarity, a web search is a good place to begin – just search 'learning styles'.

[2] Although the competencies required by volunteers may be progressively addressed within Training Packages, much of what they need will still lie outside Training Packages. Or, in some instances, you may want to draw on competencies endorsed in Training Packages in a way that suits your particular volunteering environment. Whatever the case, the Training Package approach to identifying and specifying competencies is relevant to wider use.

Irrespective of preferred learning styles, achieving knowledge and skill outcomes from learning requires the learner to be active – the learner has to be doing something. While the kinaesthetic and tactile learner is more obviously active, even the respective seeing and listening of the visual and auditory learners can be a highly active engagement if you construct the learning accordingly.[3] Although this may be obvious, in the past there has been a tendency for a training program to be designed around what the trainer does rather than what the trainee does – as evidenced by old style lesson plans.

In view of the above, best practice learning design offers a variety of learning pathways (not always declared) that give a learner the opportunity to become actively engaged in the way that best suits them. Good learning design would also expand the quality of the learning outcome if the learner realised what their preferred learning style was, and then applied it in other aspects of their learning. In other words, learning how to be a better learner would be a great outcome.

The interconnectedness of learning activity and assessment is a very important component of learning design. The trainee determining that they are ready for assessment[4], preparing for assessment, the assessment itself, and then the review of assessment outcomes are significant learning experiences. As a result, the learning designer takes into account how the competency will be assessed and integrates this with the learning design. Meeting the need is not only about training to develop the competency, but is also about demonstrating that the competency is acquired.

Your learning design will also be influenced by who is available (and appropriately competent) to join in the learning partnership supporting trainees in their learning. And you should keep in mind that these partners also have the potential for expanding their own competency and/or refreshing their knowledge and skill through providing training support.

If you are designing a competency-based learning experience, remember that the approach is to be based on achieving the target competency – not the time served or a requirement to take only one pathway.

[3] An example of an opportunity to do this being missed is the case of a student who prepares for an exam by reading over their class notes, becomes convinced that they know the subject, and then does poorly in the exam. In this case, the student may have recognised what they read, but failed to understand it. The student should have applied some form of active reading such as putting their notes aside and then writing down the key points along with examples of how these key points applied in practice – and then discussed their overview with another competent person.

[4] When you are working within a Training Package, ideally the training program should be structured so that the trainee is empowered (possibly with trainer/assessor support) to determine when they feel ready for assessment. It is also important to bear in mind that the notion of ***pass*** or ***fail*** does not apply in competency-based training. Within competency-based training the assessment outcomes are either ***competent*** or ***not-yet-competent.*** Where competency is not yet demonstrated, further training is facilitated to meet the need.

Step 6 Identifying the individual's (trainee's) competency gaps and designing individual learning plans

After you have identified the competencies required and designed the master learning program to meet this need, the first step in implementing the training program is to identify the individual trainee's competency gaps. While you can expect the cohort of trainees coming into the program to have generally similar levels of initial knowledge and skill, there will be some differences between individuals. For best practice training delivery, these differences – competency gaps – require the design of individual learning plans.

This process of identifying individual gaps will have the rigour of formal assessment where it is being conducted for recognition of prior learning (RPL) purposes. However, in most instances, its purpose will be to give the trainee and the trainer an overview of the initial competency status. Under these circumstances, the initial assessment process is likely to consist of an informal interview. From this you (and the trainee) can develop an individual learning plan (fitting within the master plan) that will help the trainee to gain best advantage from the learning experience.

Step 7 Implement the training program with continuous improvement in mind

Although future improvement may appear to be beyond the TNA phase, there is much to be learnt about how better to meet training needs from critical evaluation of the training program – what worked well and where improvement could be made.

It is also very likely that in the course of their engagement with the program, the trainees will discover competency strengths and weaknesses that were not identified before. It is not uncommon to find that one phase of learning motivates the learner to engage with another phase.

SPECIFYING THE LEARNING OUTCOME GOAL (THE COMPETENCY)

B3.1 How a competency-based approach can enhance learning

Irrespective of the scale of a training program, the targeted arrival point is that the trainee will be able to perform in accordance with a specified competency – i.e. drawing on the knowledge and applying the skill required to fulfil a role.

In *A Guide for Training Volunteers (Part A)*, the view was expressed that volunteers' learning needs mostly fall within three broad categories:

- *Imparting information:* recruitment, induction and orientation
- *Expanding competency:* technical knowledge and skill acquisition
- *Refreshing competency:* occasional training to address emerging issues and maintain skills.

This section of the toolkit will help you specify competencies for these three categories. Below are examples of how learning outcomes in these areas can be enhanced by taking a competency-based approach.

Recruitment, induction and orientation

Although recruitment, induction and orientation sessions may appear at first sight to be just information giving, the objective is for the information to inform and enable action by the attendee.

For example

It is not a satisfactory outcome from a recruitment information session for the presenter to claim success on the basis that the prospective volunteers have been told about becoming a volunteer. Rather, the objective is that they are competent to choose to become a volunteer and competent to take action to join – if they so choose. With these goals in mind, it is appropriate to specify a competency – albeit of a relatively simple nature and not subject to formal assessment – which takes the learning experience beyond just knowing about volunteering.

Compared to just 'telling', consider the stronger outcome that might be achieved from an information session where a competency such as the one below is specified, and is assessed, in a subtle manner, as having been acquired. Of course, you would not want attendees at an information session to feel that there was a 'test'. However, with a bit of ingenuity you can subtly explore in the course of the presentation the degree to which the message is getting through, and whether a potential volunteer has confidence to take the next steps.

An example competency outcome:

After participating in an information session, the attendee will possess the knowledge to make an informed decision about becoming a volunteer and will be able to make any further enquiry necessary by knowing who to approach and how to go about this. If no further information is required, the attendee will have the knowledge and ability to join the organisation if they so choose.

By specifying a competency such as this, you as the learning designer/presenter will probably consider how you could enhance the learning by providing briefing notes before the session and encouraging attendees to be active participants, and by putting them in touch with a person who can support them in the further enquiry and/or joining process. In other words, you will move beyond having just a 'telling them' objective.

In the case of induction and orientation, the targeted *outcomes from learning* are to understand what it means to be a volunteer, to be a valued and effective member of the team, to derive satisfaction from the volunteering activity and to work safely in the volunteer environment.[5] This requires more than just attending a session where information is given. You may find it interesting to specify outcomes from these sessions in competency terms – it may very usefully expand the nature of the sessions and cause you to sensitively incorporate some form of attendee assessment.

Of course, the extent to which you expand what might otherwise be thought of as 'information giving' to the level of 'competency development', and the specification of competencies, must be kept within rational bounds.

↗ Technical knowledge and skill acquisition

Clearly, competency goals are appropriate to the design and facilitation of this category of training, which probably forms the major component of your training activity. In the case of volunteering, it could be argued that *technical* knowledge and skill embraces 'being an effective volunteer' (see Figure 3) in addition to the more traditional notions of technical competencies.

The unit of competency *Be an effective volunteer* was developed by Volunteering Australia, through the NVSC project, to ground selected Training Package units of competency within the volunteering environment. This is an example of how units of competency endorsed in Training Packages can be joined with competencies of your own development to construct a training program which is suited to the needs and opportunities of your organisation. It should also be noted that this unit of competency is not as expansive in its specification as is the case for Training Package units of competency. However, it is a good 'getting started' model if you want to specify units of competency which are applicable to your environment.

[5] A learning outcome such as *functioning safely* may be regarded as stand-alone or parts of the four learning outcomes listed here – e.g. *functioning safely* may be a component of being a valued member of the team or of such significance that it is assigned stand-alone status.

BE AN EFFECTIVE VOLUNTEER

About this competency

Be an Effective Volunteer covers what it means to be a volunteer and deals with the volunteer's orientation to the organisation.

ELEMENT 1 Apply knowledge of volunteering sector to a volunteer work role

Performance criteria

1.1 Consideration and understanding of the underpinning philosophy and principles of volunteering is demonstrated in all work undertaken as a volunteer.

1.2 Work practices are consistent with relevant, current organisational and volunteering sector policies and legislative requirements.

1.3 Work practices are consistent with the rights and responsibilities of volunteers.

1.4 All work undertaken is consistent with the rights and responsibilities of the organisation.

1.5 All work undertaken reflects an understanding of the issues facing volunteers and the volunteering sector.

ELEMENT 2 Apply basic work practices to a volunteer work role

Performance criteria

2.1 Time and work tasks are managed and organised effectively.

2.2 Able to work effectively in a team.

2.3 A basic understanding of communication network(s) and processes and relationships between paid and volunteer staff are applied.

2.4 Able to identify and access support structures available to volunteers.

2.5 All work undertaken demonstrates a commitment to the recognition and support of diversity.

2.6 Work is effectively carried out within the organisational structure and boundaries of the work role.

Figure 3 Be an effective volunteer *unit of competency as incorporated within the Certificates I, II and III of Active Volunteering*

↗ Occasional training to address emerging issues – including refresher training

Although this category of training may not be the major component of your training activity, it could be the area in which you are most frequently involved in identifying need (and opportunity) and specifying competencies. Refresher training – skills maintenance – is a special case and may be a regularly scheduled activity.

B3.2 How to identify and specify the required competency

A reminder: what is 'competency'?

> Competency comprises the specification of knowledge and skill and the application of that knowledge and skill to the standard of performance required in the workplace. Units of competency define the various competencies required for effective workplace performance.
>
> This definition of competency focuses on what is expected of an employee in the workplace rather than on the learning process, and as such embodies the ability to transfer and apply skills and knowledge to new situations and environments.
>
> Units of competency are concerned with what people are able to do, for example 'maintain and use networks' and with the ability to do this in a range of contexts, for example 'maintain and use networks of suppliers and government agencies'. They emphasise outcomes and the application of skills and knowledge, not just their specification. (DEST 2005 pp. 105-106 – *Training Package Development Handbook* – www.dest.gov.au)

There are essentially four stages in specifying a competency. Figure 3 – *Be an Effective Volunteer* – gives an indication of these four stages:

1. The unit of competency is identified by a descriptive title – in this case *Be an Effective Volunteer*.
2. The overall nature of the competency is briefly described under the heading About this competency.
3. The unit of competency has been subdivided into elements – in this case *Apply knowledge of volunteering sector to a volunteer work role* and *Apply basic work practices to a volunteer work role*.
4. Each of the two elements has then been defined in terms of performance criteria – i.e. what the volunteer must be able to do and demonstrate as proof of competency.

To arrive at this competency specification an appropriately expert panel identified that being an effective volunteer is a key component of volunteering and is worthy of being the focus of a unit of competency. The next step was to determine what elements might comprise the unit of competency. The process then moved on to describing (as performance criteria for each element) what a competent volunteer must be able to do. This is a very logical process, but requires a high level of rigour in moving from initially identifying and describing a unit of competency through to specifying performance criteria. In the course of this process the required knowledge and skill and the context in which they are applied are identified and outlined in an expanded unit of competency descriptor (beyond what is illustrated in Figure 3) such as you will see in Training Package documents.

> **Note**
>
> In this guide competencies are discussed very much in the context of Training Packages, because volunteer-involving organisations seem likely to draw increasingly on Training Package competencies and integrate them with competencies they have developed themselves. In comparing competencies developed by volunteer-involving organisations and Training Package competencies you will find that – because of continuous improvement – recently developed competencies are more fully articulated than earlier ones.
>
> As a starting point for specifying competencies, Template 3 is offered both as an overview of the content of units of competency, and as a road map or a checklist for you to use when thinking about and then specifying units of competency.

The template may also be useful to colleagues whose assistance you have sought with specifying competencies. It may also help lay the foundation for collegiate ownership of the competencies. 'Ownership' of competencies is very important as they are the learning outcome targets; it is pivotal to training success for stakeholders to value these outcomes.

After reflecting on this section of the guide, identify a need (or opportunity) within your volunteer-involving organisation where an advantage could be gained by formally specifying a unit of competency. Discuss this with some colleagues and work with them to specify a competency.

Template 3 *Competency specification checklist*

Unit of competency title:

Description of the unit of competency:

Units of competency must:	**Complying** Yes/Not yet	**Comments** – key points and/or other issues which explain the 'complying' response
• be consistent with the agreed national definition of competency		
• include the four components of competency[6] – task skills – task management skills – contingency management skills – job/role environment skills		
• relate to realistic work practices		
• be expressed as outcomes		
• be clear and precise		
• be relevant to current and future industry skills needs		
• include knowledge and understanding		
• reflect industry values and attitudes		
• allow for the needs of people with disabilities		
• include explicit skills covering language, literacy and numeracy		
• provide for environmental matters, regulation and licensing as applicable		
• include advice on contextualisation		

An overview of the process of specifying competencies is illustrated in Figure 4. This process is premised on there being three broad categories of training that are relevant to volunteer-involving organisations (see section A4.3 of *A Guide for Training Volunteers* and section B3.1 of this toolkit).

[6] Refer to pp. 105 and 106 of the *Training Package Development Handbook* (2005) – www.dest.gov.au – for an explanation of these 'four components of competency' and each of the items listed in this template.

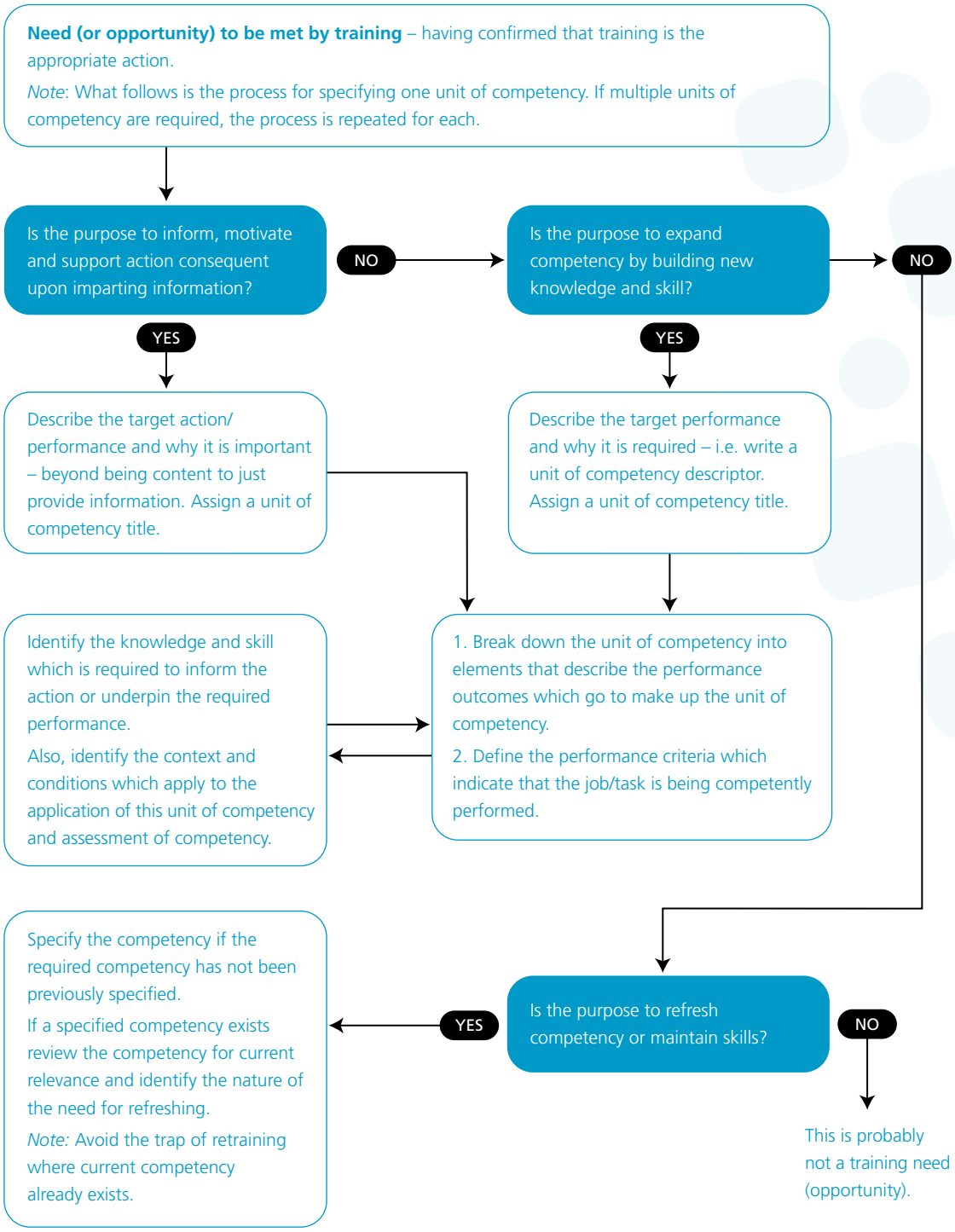


Figure 4 *A process for specifying competencies*

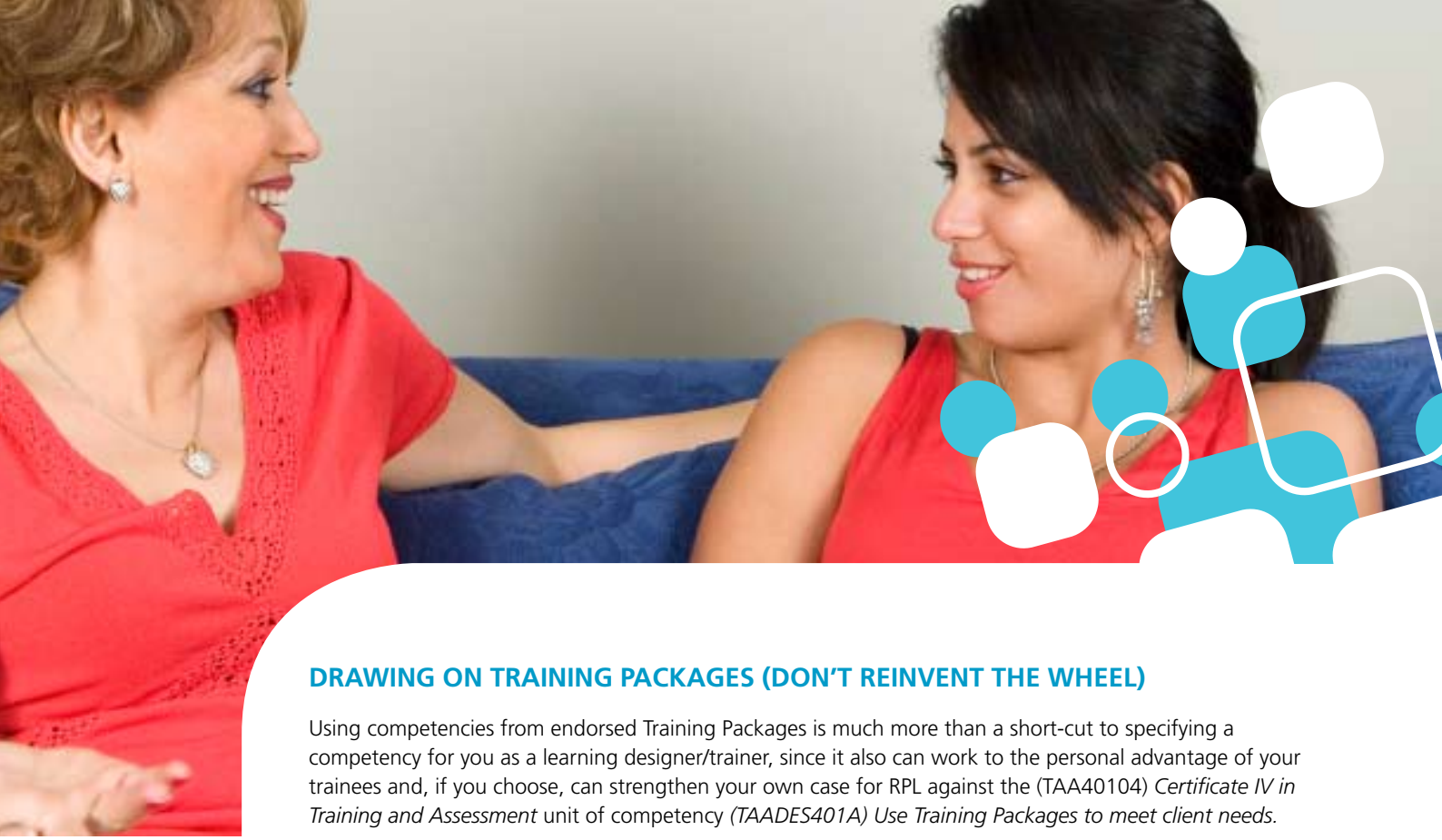
To explore use of this process in your volunteer-involving organisation:

1. Identify some examples of training need (opportunity) in each of the three categories – imparting information, expanding competency, refreshing competency.

2. Prioritise the examples within each category and, as a self-check, record your reason for assigning the priorities.

3. For the highest priority in each category, work through the Figure 4 process initially in a scoping manner, just to get a feel for what appears to be involved. (Don't be surprised that if you return to this process in a more detailed way you will make significant changes to these first feelings.)

4. Discuss your outcomes from this review with some colleagues – there might be some training implementation which deserves immediate attention.



DRAWING ON TRAINING PACKAGES (DON'T REINVENT THE WHEEL)

Using competencies from endorsed Training Packages is much more than a short-cut to specifying a competency for you as a learning designer/trainer, since it also can work to the personal advantage of your trainees and, if you choose, can strengthen your own case for RPL against the (TAA40104) *Certificate IV in Training and Assessment* unit of competency *(TAADES401A) Use Training Packages to meet client needs.*

Completing (or even partly completing a Training Package unit of competency) could motivate a volunteer to get started on a formal VET[7] qualification because of the advanced status that they can claim through recognition of prior learning (RPL). Or if the volunteer has already commenced studies toward a formal VET qualification, the RPL opportunity for them is significant if their volunteer training aligns with their course.

Drawing on Training Package units can favour RPL

Even where the volunteer is undertaking training outside a Registered Training Organisation (RTO) environment, they can claim RPL when supported by evidence of the competency acquired through their volunteering. They don't even have to have achieved this through a training program, but it helps greatly if you have incorporated Training Package competencies into their training. In this respect, Volunteering Australia, through the NVSC project, has prepared an RPL guide that is a valuable resource for you.

[7] Vocational Education and Training (VET) qualification – Certificate (I, II, III and IV), Diploma, Advanced Diploma. Refer to the Australian Qualifications Framework accessible at www.aqf.edu.au

Figure 5 illustrates a process that you could use to explore the possibilities of incorporating Training Package units of competency within your training of volunteers.

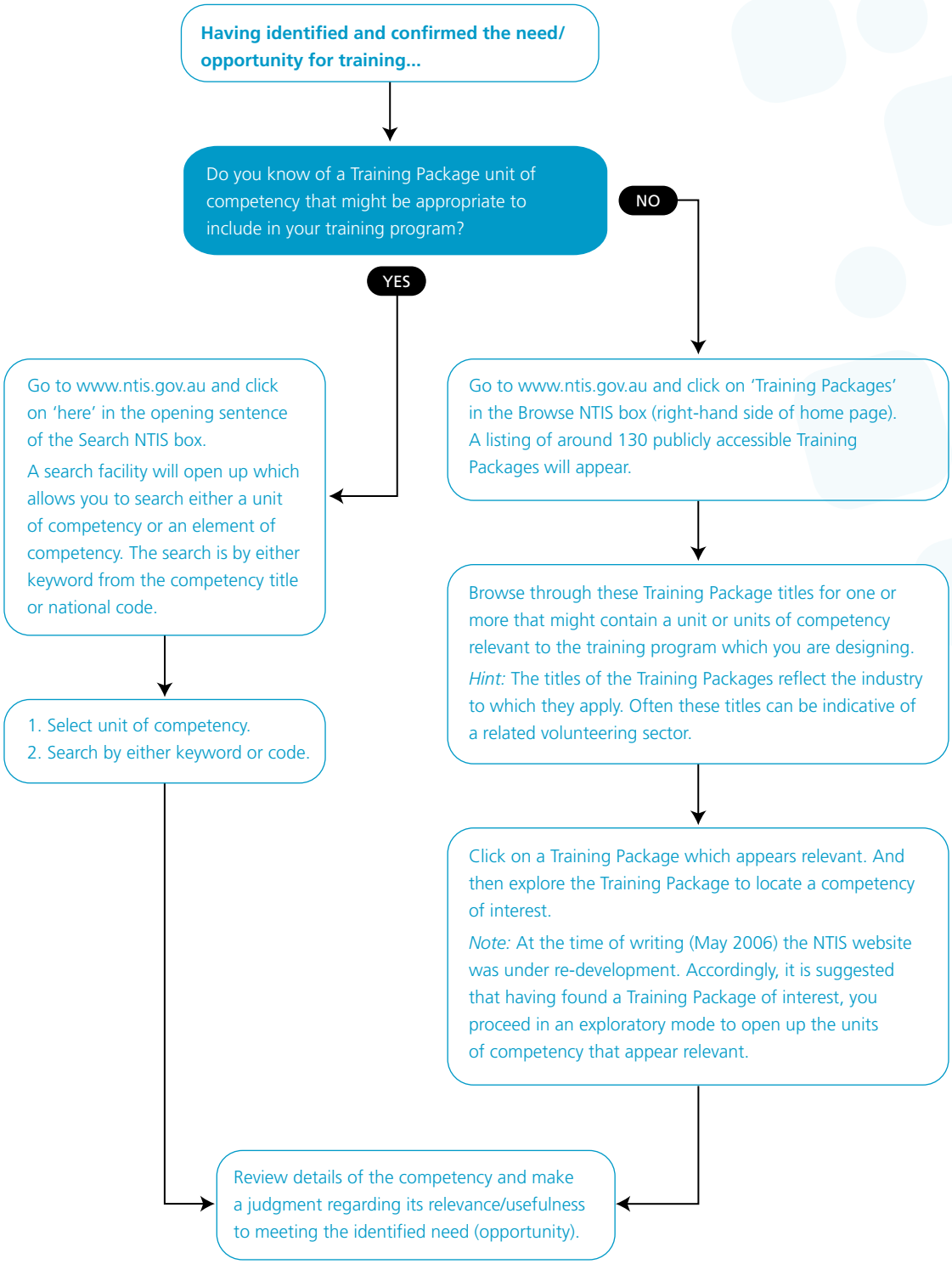


Figure 5 *Searching for a Training Package unit of competency*

B4.1 Specifying prerequisite competencies – the nominal starting point

Specifying a competency – or set of competencies – is the foundation on which you begin developing a training program[8] to meet a performance need (or make use of an opportunity) that has been identified on the part of a volunteer (or possibly even a career staff member). The competency will have been specified based on what is required to perform the job/task and, in the process, you will have formed a view regarding the knowledge and skill ('incoming' or nominal starting competencies) that a trainee will need to have at the start of the training.

For example

A volunteer joining a training program to develop the competencies (as implied by the position/task description) needed to deliver food to housebound people might reasonably be expected to be able already to:

- drive a car safely
- read a map
- form empathetic relationships with the client group.

In addition to developing competencies such as safe food handling, supportive customer relations, and compliance with legal obligations, the training program might include building on these expected incoming competencies.

It is very important to have a sense of what competencies a trainee should bring to a training program. And, while access and equity principles are important, there are practical advantages to convening a reasonably cohesive trainee group with reasonably similar starting points – see Figure 6. In this respect, having a position (or task) description expressed in competency terms is very helpful – especially if it gives an indication of key selection criteria and the nature of training to be provided to achieve competency.

For example

The key selection criteria for a 'meals on wheels' food delivery volunteer might include 'possession of a current driver's licence', with an implied expectation of being a safe and effective driver (e.g. alert to other road users, able to parallel park a car, etc.). With respect to food handling, the relevant key selection criterion might be 'a willingness to undertake training in safe food handling'.

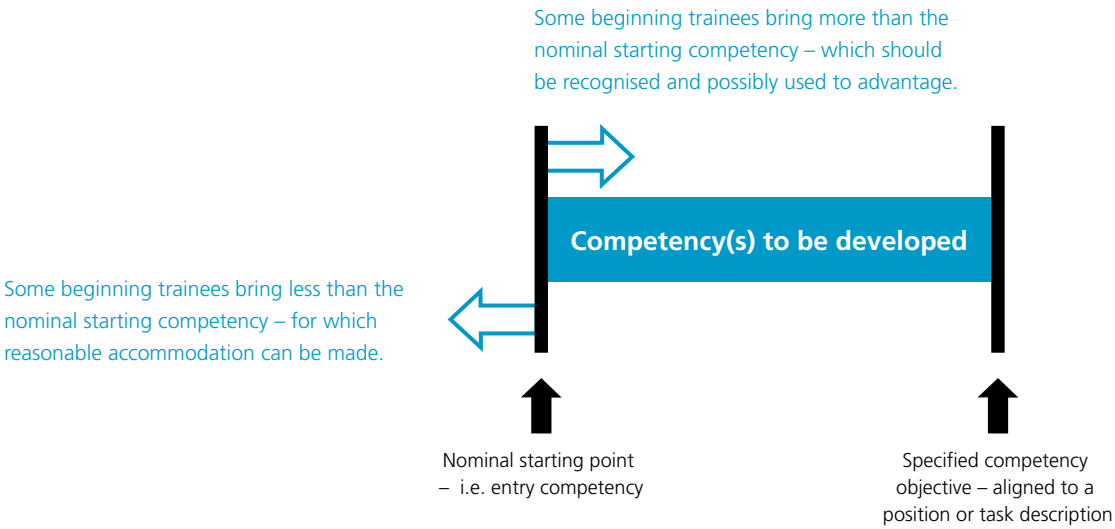


Figure 6 *Nominal entry competency*

[8] Given the large and growing body of endorsed Training Package competencies, once you have specified the competency required, you may find there is a Training Package competency that meets the need – at least partially.

Without some sense of a nominal starting point it is very difficult to design a training program. However, there will always be some variation in what individual trainees bring to a training program; and, within reasonable bounds, you should plan to accommodate this variation. The question then becomes, 'What is an acceptable variation?' Within a group of beginning trainees, you would not want to have some who are so far behind the competency level of the core group that catching up to them seems unlikely. Similarly, you would not want to have beginning trainees whose competencies are so advanced that they question the appropriateness of participating in the program.

- For beginning trainees whose competency falls short of the nominal incoming level, you can arrange additional learning that they undertake before they start the program or possibly even during the early stage of the program. Having helped the 'below nominal' to begin training with an adequate level of incoming competence and confidence, you may find that questions asked (with your encouragement) by those who are relatively weak cause other trainees to reconsider their own positions – each person can learn from the other.

- Where beginning trainees have advanced competency with respect to the nominal starting point, you can use this to advantage by drawing on these trainees as a resource (talking about their experience, etc.). However, they may become frustrated with going over territory they already know and things they can do; and they may force an acceleration of pace that leaves others behind. Under these circumstances consider granting partial RPL or negotiating a form of participation which acknowledges their advanced knowledge and skill level.

The advanced trainee is relatively easy to manage as they are more likely to be a useful resource than a problem – providing participating in the training goes beyond just revisiting current competency. However, the beginning trainee who falls short of nominal entry competency is much more difficult to manage appropriately as, at some point, their shortfall may be such that entry to the program at that point is not appropriate. This may involve management of legislated access and equity obligations and processes which are beyond the scope of this guide.

There are four components of competency: task skills, task management skills, contingency management skills, and job/role environment skills. These are described in more detail in Table 1. You may find it helpful to draw on these four components when specifying – in general terms – the learning goal for your program. You will then be in a position to work backwards to specifying the nominal entry competency you think fits the circumstances for which the training program has been designed. Template 4 illustrates this approach.

Addressing the four components of competency

Not all competencies, and not all training programs, give these four components the same weight. One or more of the four may sometimes predominate, or may not even be addressed. However, the *Training Package Development Handbook* (DEST 2005, p. 106) recommends that although an individual unit of competency may not embrace all of the four skill components, all should be addressed within a group of related competencies. Table 1 is a summary, with examples, of the four components of competency.

Table 1 *The four components of competency*

The four components of competency – as defined in the *Training Package Development Handbook* (DEST 2005, pp. 106-107)	**Volunteer examples** These are very general examples and are not expressed in terms of detailed performance criteria.
Task skills involve the capacity to perform required workplace tasks.	*For example* • A volunteer competently delivering food to housebound people. • A volunteer competently providing first aid to an injured person. • A volunteer competently giving information via a telephone advice service.
Task management skills involve the requirement to manage a number of different tasks, capturing the skills people use as they plan and integrate a number of potentially different tasks to achieve a complete work outcome.	*For example* • A volunteer competently planning their approach to the collection and delivery of food in a meals-on-wheels program. • A first-aid volunteer competently ensuring that their medical supplies and equipment are complete and in good order. • A volunteer competently ensuring that they are familiar with new communication technology before going on duty with a community advice service.
Contingency management skills cover the requirement to respond to irregularities and breakdowns in routine, encompassing the skills used in day-to-day employment and allowing for dealing with irregularity, imperfections and the unknown.	*For example* • A volunteer engaged in the delivery of meals to dependent people competently identifying things such as personal health, vehicle breakdown, client not admitting them to the home, that may cause a change in their routine and having strategies in place to address the changed situation. • A volunteer first-aid officer competently attending an incident and confidently dealing with injuries that they did not know about before they arrived on the scene. • A telephone advice volunteer knowing when to make a referral to another person under circumstances where the client situation requires this.
Job/role environment skills are those skills we use in dealing with the responsibilities and expectations of the work environment and in working with others. This can include interacting with people from within and outside the enterprise, such as colleagues, customers, clients and the public. The capacity to work with others and to adapt to different situations and the varied demands of employment across enterprises is central to successful performance.	*For example* • A meals delivery volunteer appropriately advising the service that they are unavailable for service. • A first-aid volunteer working co-operatively with a range of emergency service volunteers as might be required in a major incident. • A telephone support service volunteer remaining calm and empathetic in circumstances where the caller is in a high state of personal stress.

Template 4 *Describing target competency and nominal entry competency on the basis of skill components*

Competency title:		
The four skill components of competency*	**General description of the skill as a component of the target competency**	**General description of prerequisite entry competency related to the skill**
• **Task skills** – involving the capacity to perform required workplace tasks.	*It is suggested that these descriptions should be of an overview nature –i.e. not fully articulated as competencies as would be the case if you were formally writing elements of competency and performance criteria.* *The purpose is to have a sense of where you are going in terms of learning outcome goals (competencies achieved) and the starting point of the typical trainee.* *Your purpose is to describe – in general terms – the competency gap to be bridged by the trainee undertaking the training program.*	
• **Task management skills** – involving the requirement to manage a number of different tasks, capturing the skills people use as they plan and integrate a number of potentially different tasks to achieve a complete work outcome.		
• **Contingency management skills** – covering the requirement to respond to irregularities and breakdowns in routine, encompassing the skills used in day-to-day employment and allowing for dealing with irregularity, imperfections and the unknown.		
• **Job/role environment skills** – those skills we use in dealing with the responsibilities and expectations of work environment and in working with others. This can include interacting with people from within and outside the enterprise such as colleagues, customers, clients and the public. The capacity to work with others and to adapt to different situations and to the varied demands of employment across enterprises is central to successful performance.		

* From *Training Package Development Handbook* (DEST 2005, pp. 106-107)

B4.2 Assessing current competency of a new trainee

Recognition of Prior Learning (RPL) and Recognition of Current Competency (RCC) are used synonymously. However, in this instance the term 'current competency' is being used as it is more descriptive of what a trainee brings to the training by way of current knowledge and skill. At the beginning of a training program there are several reasons why a trainee's current competency might be assessed. These reasons range from

> it wastes resources and it is offensive to require a person to undertake training when they are already competent
>
> to
>
> competency gaps need to be properly addressed so that the training can be delivered in a way that best meets individual needs within the context of a program that is accommodating a group of trainees with individual incoming strengths and weaknesses.

A beginning trainee may already be competent and further training is not appropriate. In the case of a formal VET training course leading to a qualification, a trainee with current competency may seek formal acknowledgment (a Statement of Attainment) for a unit of competency. Indeed, under the Australian Quality Training Framework (AQTF) a Registered Training Organisation (RTO) must provide information about RPL (and credit transfer) to a student prior to enrolment.[9] However, in much volunteer training the reason for establishing the level of incoming competency is so that the learning experience can be tailored to address gaps in competency – the awarding of RPL is not typically in mind.

Facilitating a training program to achieve the same competency outcomes where different trainees have different incoming skills and knowledge and different competency gaps may seem problematic. However, not having this insight is even more hazardous. As a learning facilitator, a significant aspect of your role is to nurture the motivation of the learner to learn – teaching what is already known is a big 'turn-off', whereas acknowledging and valuing current competency (on an individual basis) opens up the prospect of drawing on it as a resource to be used within the course of the program.

Getting it right – making the most of trainees' current competency in a group training situation

A trainer of volunteers gently and politely assessed the incoming individual competencies of each trainee within the group. This opened up the opportunity to draw strategically on the experience of each trainee as a resource to help others while also being a mechanism for the 'knowing' trainees to refresh their knowledge and to reflect on whether they were really as currently competent as they thought. In this group, at any one time, individual trainees were learning and refreshing differently, but all under the influence of a structured learning experience. At the end of the program, in addition to the evidence that target competency had been acquired, the feedback indicated that everyone had valued the experience of sharing and growing together – they had in fact melded into a strong community of practice.

[9] AQTF Standard 6.3, xi.

Figure 7 illustrates a process for assessing the current competency of a beginning trainee, according to whether you are doing it for the purpose of formally awarding RPL or for the less formal purpose of constructing a learning approach which is suited to the individual trainee.

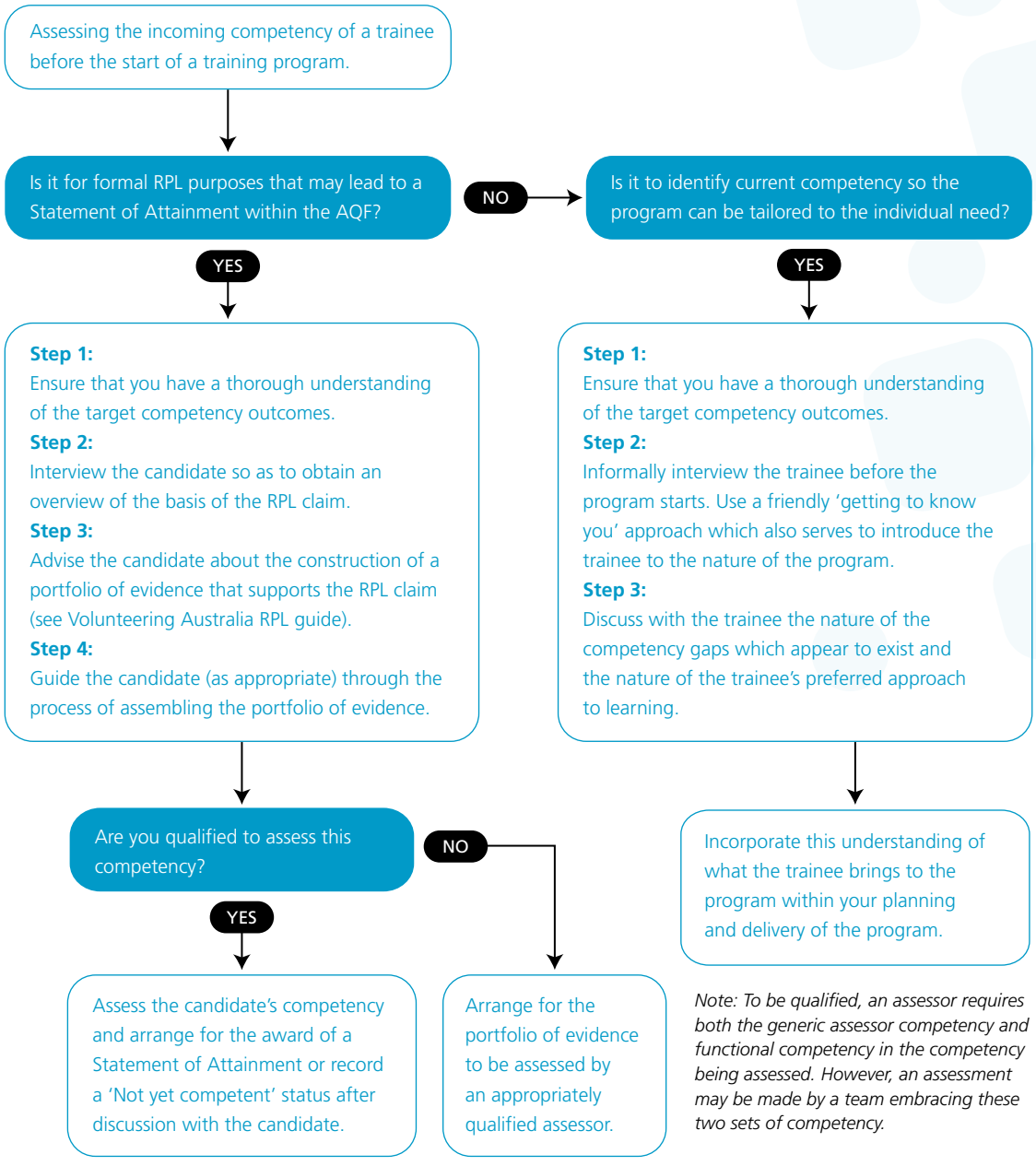


Figure 7 *Assessing beginning competency of a trainee*

DESIGNING LEARNING (CREATING A TRAINING PLAN)

Developing a training plan commences with having a clear objective – 'knowing where you are going' – which includes knowing 'why' and 'who'. The 'why' motivates the organisation and the individuals (learners, trainers and others contributing to the learning experience) to embrace the learning and draw on the necessary resources. Except when you are creating an individual learning plan, the 'who' does not require you to know the prospective trainees individually, but does require you to identify and describe a target audience.

The learning design evolves from considering how best to meet the objective, taking into account the features of the learning environment. These include the resources available for designing and delivering the learning, the spread of learning preferences of the target audience, the people who are available to participate as partners in supporting the learning, where and when the learning is to occur, and the means by which the learning outcomes will be assessed.

A recommended way of getting an overview of what is involved in learning design is to look at the specification for the (TAA40104) *Certificate IV in Training and Assessment* unit of competency *(TAADES402A) Design and develop learning programs*. You can access this at www.ntis.gov.au.[10]

If you have experience as a learning designer, compare your current approach with what is outlined in the *(TAADES402A) Design and develop learning programs* competency standard. If your approach is markedly different, why is this so? Discuss your finding with a colleague.

OR

If you are a newcomer to designing learning, think about the apparent usefulness of the competency standard *(TAADES402A) Design and develop learning programs* as a framework for you to set about building your competency in this regard. If it doesn't appear useful, why is this so? Discuss your finding with a colleague.

[10] Keep in mind that RPL is available to you if, through your experience as a trainer, you can demonstrate proven competency with respect to this unit of competency. And even if you can't assemble sufficient evidence of competency, you will be well advanced in your learning if you are familiar with the topics within this unit.

B5.1 Focusing on the learner learning, not the teacher teaching

In the past, it was not uncommon for learning design to be expressed as a lesson plan which focused on what the teacher/trainer intended to do during a lesson or a training session.

Focus on the trainer

A trainer of volunteer museum guides prepared and delivered a training session that was mostly taken up with the trainer talking about the nature of the museum, its collection and the role and responsibilities of the volunteer guides. During the session, prepared notes about the topics covered were handed out to the trainees, including copies of the overhead projector transparencies that the trainer used during the presentation.

The trainer had prepared a session plan which began with the objective *'To inform new volunteers about the museum and their role as volunteer guides'*. The plan then went on to list the topics and show how long the trainer would spend on each. There was a list of resources to be used by the trainer. And there was a reminder to conclude the training session by requesting trainee feedback via the evaluation sheets.

Due to time constraints – as the trainer had a lot to get through in the allotted 90 minutes – there was little opportunity for the trainees to ask questions and to actively engage with the hand-out materials. Even on the sensitive matters of visitor relations and exhibit security, the key issues were dot-pointed, the trainer spoke about them, and it was apparently assumed that as a result the trainees were now competent to deal with them – maybe the trainees would read over the hand-outs after the training session.

At the end of the session the trainees filled out session evaluation forms; and gave positive feedback along the lines that they were very impressed with what the trainer knew and the enthusiasm with which the session was conducted. The refreshments before the session were much appreciated and the trainees felt that they had learnt a lot.

In practice, the team leaders of these volunteers found that they had a lot to do in coaching the new volunteers to be effective museum guides. The volunteers didn't remember much of what they had been told at the training session, they weren't initially confident when dealing with the public and were not alert (and hence not responsive) to exhibit security and public safety matters. In reality, their competency development was totally on-the-job and on-the-run in an ad-hoc manner subsequent to the training session.

The story above shows what can happen when the focus is on the trainer. If the learning design had focused on the trainees instead, the story might have gone as follows:

Focus on the trainee

A trainer of volunteer museum guides prepared and facilitated a training session in which the trainees were very active learners – the trainer took up as little time as possible of the allotted 90 minutes so that the trainees were actively engaged in learning. This active engagement included discussion (sharing of views and relevant life experiences) and role playing as topics were progressively addressed. The session culminated with a two-syndicate quiz challenge in which each syndicate developed questions – including 'how to handle' scenarios' – which were then put to the other syndicate; and the trainer led the open-forum discussion in which the trainees expressed views regarding the quality of the questions and the responses. During the session, dot point prompts were displayed by overhead projector and trainees were given hand-out notes.

The objective of the session was defined as *'New volunteers able to draw upon underpinning knowledge and understanding with respect to the museum and its collection and their role as a volunteer guide.'* The session objective was then expanded on by defining the context as *'The knowledge then to be a foundation on which – under the guidance of a team leader and with further training – the volunteers can progressively develop skill, and confidence, in dealing with the public and contributing to the security of the museum exhibits and contributing to public safety'.*

Given that there was a lot to cover in the 90 minutes – an overview of the museum and its collection, the role of the volunteer guide, public relations, security of the exhibits, and public safety – the learning strategy/design included providing briefing notes to the trainees before they attended the session and a requirement that they discuss these notes with their prospective team leader prior to the session. By this means the trainees were advanced in their learning and they had already begun building a learning partnership with their team leader. The learning strategy/design also included a description of how this session was to be integrated into the master learning plan/design for these trainees.

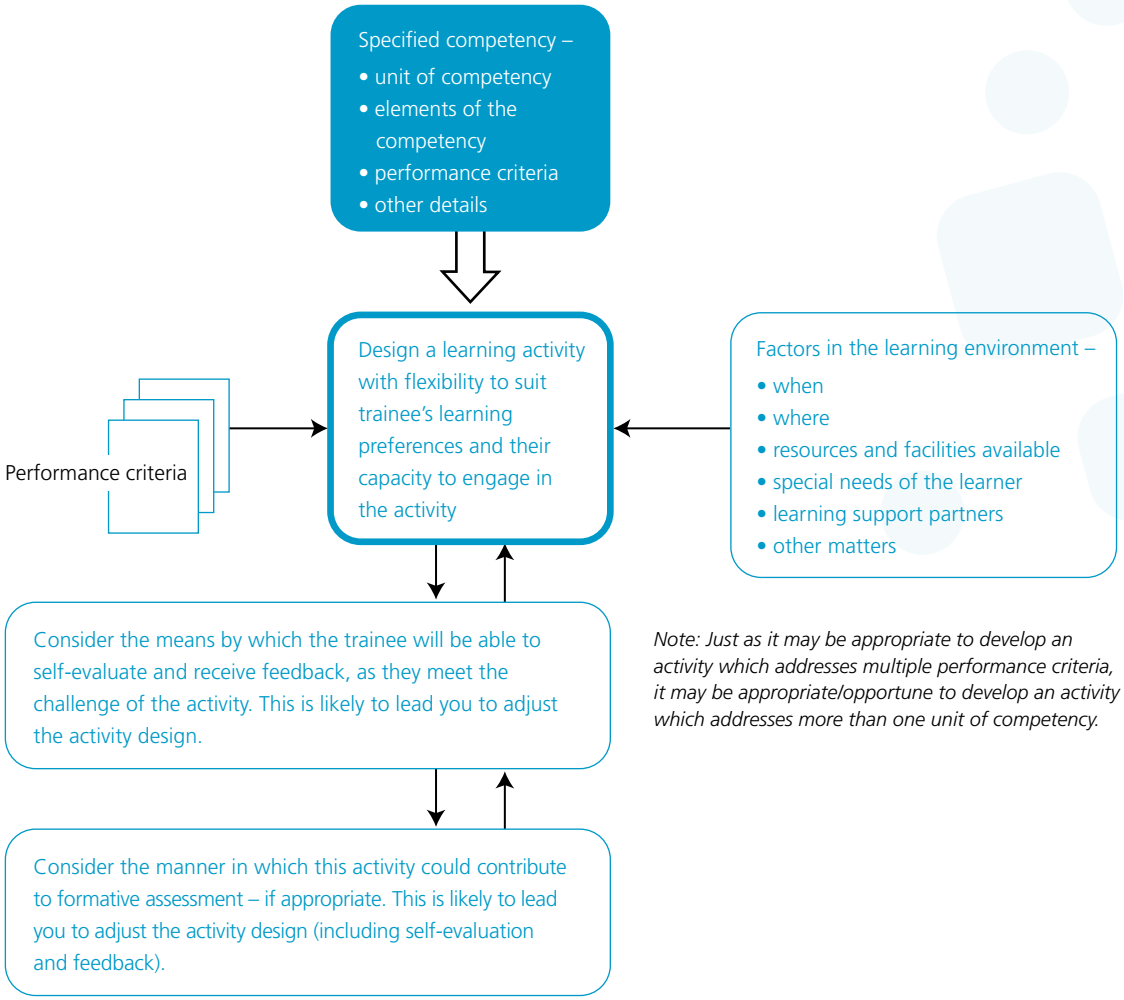
The running sheet for this training session was expressed in terms of learning objective, schedule of participant activity as topics were progressively addressed, a strategy for extending the learning to the workplace with the support of the team leader, the manner in which the open forum provided a means of assessing participant competency (albeit only a foundation for further learning competency[11]) at the conclusion of the session, resources to be drawn upon, and a means of getting feedback on the perceived quality of the learning experience.

In a 'book-ending' manner, a second session was scheduled to occur four months later – giving sufficient time for experience and coaching on-the-job. The trainees were advised that the second session was to be in the form of a learning experience based on a hypothetical 'Month in the life of a museum volunteer guide'.

There is a marked difference between these two stories. In the first one, there is an expectation that *if the teacher teaches, the learner will learn* – this view persisted in our teaching and training environments for many years. In the second story, there is a recognition that *to learn, the learner must be actively engaged* – the learner must be doing something with the information that is put before them – and the training strategy is a response to that recognition.

[11] In the delivery of Training Package-orientated learning there are two categories of assessment of competency – formative and summative. Formative assessment (if applied) occurs throughout a training period as a trainee progressively builds their stock of competency. Whereas formative assessment may not always be incorporated within the learning experience, summative assessment (all embracing and at the end of a training period) must always occur. In this example, the end of session assessment is of a formative nature.

Another way of thinking about active learning is the idea that 'For learning outcomes there must be challenge'. For many learners, tackling challenges is an enjoyable experience, but there are instances where learning is associated with the need to survive and with stress. An example would be where a volunteer has to undertake training to hold on to their volunteering role, but is anxious about their ability to learn. As a trainer of volunteers you may have come across instances where a volunteer's learning difficulties were a problem requiring very sensitive handling. The challenge for you as a trainer then becomes how to put yourself in the role of someone who facilitates learning rather than presents knowledge, and to support the trainee as they address the learning activity (challenge) which you have guided them towards. Figure 8 shows how a learning activity can be designed to facilitate learning.



Note: Just as it may be appropriate to develop an activity which addresses multiple performance criteria, it may be appropriate/opportune to develop an activity which addresses more than one unit of competency.

Figure 8 *An approach to designing a learning activity*

As a learning designer you will draw on a variety of learning theories – according to circumstances and your own predispositions within a large arena of academic debate. However, you may find the following definition by David Kolb (1993) a useful overview of the process of experiential learning.

A definition of learning

Even though definitions have a way of making things seem more certain than they are, it may be useful to summarise this chapter on the characteristics of the experiential learning process by offering a working definition of learning. *Learning is the process whereby knowledge is created through the transformation of experience.* This definition emphasizes several critical aspects of the learning process as viewed from the experiential perspective. First is the emphasis on the process of adaptation and learning as opposed to content or outcomes. Second is that knowledge is a transformation process, being continually created and recreated, not an independent entity to be acquired or transmitted. Third, learning transforms experience in both its objective and subjective forms. Finally, to understand learning, we must understand the nature of knowledge, and vice versa. (Kolb 1993, p. 155)

Understanding the theory behind learning design

Although you may get by with intuitive understanding of learning design, being a truly competent learning designer requires you to have knowledge of learning theory so that you are alert to choices and are making informed learning design decisions. *Culture and Processes of Adult Learning* (Thorpe, Edwards & Hanson, 1993) – from which the citation above is taken – is a useful resource to start with.

B5.2 Embracing the principles of adult learning

Since around the early 1980s there has been much debate and writing on the topic of how learning by adults differs from learning by children. Malcolm Knowles has been a significant commentator and author on the topic. Knowles expresses the view that adults learn best when the learning design/activity takes the following into account:

↗ The adult learner prefers to be self-directed.

...the psychological definition of adult is 'One who has arrived at a self-concept of being responsible for one's own life, of being self-directing.' When we have arrived at that point, we develop a deep psychological need to be perceived by others, and treated by others, as capable of taking responsibility for ourselves. And when we find ourselves in situations where we feel that others are imposing their wills on us without our participating in making decisions affecting us, we experience a feeling, often subconsciously, of resentment and resistance. (Knowles & Associates 1984, p.9)

Knowles (et al.) go on to say that when adults go into a situation identified as training (or similar) they may expect to be taught as they were as children, but this conflicts with their adult need to be self-directed. As a consequence, a trainer must help the trainee make the transition from dependent child learner to elf-directed adult learner (Knowles & Associates 1984, p.9).

↗ Adults bring their life experiences to their learning.

> ... for many kinds of learning, adults are the richest resources for one another; hence the greater emphasis in adult education on such techniques – group discussion, simulation exercises, laboratory experience, field experiences, problem solving projects, and the like that make use of the experiences of the learners. (Knowles & Associates 1984, p.10)

Knowles (et al.) go on to make the point that adults tend to express their self-identity in terms of their experience, whereas as a child they would have expressed their self-identity in terms of external sources such as the name that they were given, who their parents were, where they lived and the school that they attended. The implication is that if, in a learning experience, an adult's experience is not recognised, valued and drawn on, then the adult will feel rejected (Knowles & Associates 1984, p.11).

↗ The need to know or do something so as to become more effective is the motivation for an adult to engage in learning.

> ...there are things that we can do to induce it [readiness to learn] such as exposing learners to more effective role models, engaging them in career planning, and providing them with diagnostic experience in which they can assess the gaps between where they are now and where they want and need to be. (Knowles & Associates 1984, p.11)

In introducing this principle of adult learning, Knowles (et al.) observed that changes in life such as birth of a child, loss of a job, divorce, death of a friend, or relocation, can 'trigger a readiness to learn' (Knowles & Associates 1984, p.11). However, there are things that a person connected to the adult (such as a manager, trainer, or other in an organisational setting) can do to motivate new learning. These things relate to supporting self-assessment of the gap between where an adult is now and where they want to be and supporting the adult's learning to bridge this gap.

Knowles' (et al.) (1984, p.11) 'bridging of a gap' position resonates strongly with the competency-based training approach of focusing on the competency gap and constructing a learning pathway – as suits the adult – to bridge the gap.

↗ Generally adults don't learn for the sake of learning – they learn to achieve a goal.

> We have a dictum in adult education that one of the first tasks of a facilitator of learning is to develop 'the need to know' what will be learned. (Knowles & Associates 1984, p.12)

In getting to the above statement, Knowles (et al.) emphasised that, as a consequence of having an acknowledged need, adults have a life-centred, task-centred or problem-centred orientation to learning (Knowles & Associates 1984, p.12). Accordingly, as a trainer of volunteers, an important part of your role is to work with the trainees to identify real need (and/or opportunity) for them to engage with the learning.

↗ Internal motivations to learn are more potent motivators than external reasons for an adult to learn.

> Although it acknowledges that adults will respond to some external motivators – a better job, a salary increase, and the like – the andragogical model predicates that the more potent motivators are internal – self-esteem, recognition, better quality of life, greater self-confidence, self-actualization, and the like (Herzberg, 1966; Maslow, 1970). Program [training] announcements are accordingly placing increasing emphasis on these kind of outcomes. (Knowles & Associates 1984, p.9)

The five points above frame what Knowles (et al.) (1984, pp. 8–9) refer to as the 'andragogical model' as distinct from the traditional pedagogical model long applied to the teaching of children – in which the child learner is a dependent learner, relies on the experience of the teacher rather than their own experience, learns so as to advance to the next grade, has a subject orientation to learning, and is motivated by external pressures such as from parents and fear of failure.

Later in *Andragogy in Action*, Malcolm Knowles (et al.) draw attention to how the role of an instructor [sic] changes when there is a shift from child-like dependency on the teacher to a learning environment in which adult learning principles are recognised – 'In this type of learning system, instructors become facilitators of the process. Their primary role is to guide the learning process, rather than manage to content of the course.' (Knowles & Associates 1984, p.84). Arguably, it is your ability, as a trainer of volunteers, to see yourself as a facilitator of learning which is profoundly important in supporting your trainees in achieving competency – just passing on knowledge (maybe) is not getting the job done.

Think about your experiences of learning as a child compared to the best and the worst experiences of being an adult trainee (including formal education as an adult).

AND / OR

Conduct a small-scale inquiry among some volunteers about what they have found to be the best training experiences and why. And then compare these responses to the andragogical model of learning.

Template 5 draws on the andragogical model and is offered as a tool that you may find helpful when designing learning for adult[12] volunteers.

[12] This guide assumes that the volunteer learners are all adults. However, you may need to design learning activities for children as volunteers. If so, the pedagogical model may still be appropriate.

Template 5 *Drawing on the principles of adult learning*

Key questions	Summary of learning design strategy
What provision has been made for self-directed learning? Not all of the training has to be highly self-directed. A reasonable balance between directed and self-directed learning will often be appropriate. The key requirement is that the trainee has a sense of being appropriately in control of the learning.	
How has the learning been structured to draw on a trainee's life experiences? This is both a matter of using a valuable resource and demonstrating respect for the trainee. However, it is a creative challenge to construct a learning activity which draws on the experiences of unknown trainees, especially given the diversity found amongst volunteers. Being able to specify or have some control over the composition of your target group is of great importance.	
How will the learning contribute to the volunteer being more effective in their role – and do they value this? This is largely influenced by three key issues: 1. Do the trainees acknowledge that the competency standard is valid? 2. Do the trainees acknowledge that they personally have a competency gap? 3. Do the trainees believe that the training program will achieve the stated aims?	
Is the learning objective – as specified by the competency – consistent with the anticipated personal goals of the target trainee group? In the case of volunteering this may be a balance between meeting the requirements of the volunteer-involving organisation and the reasonable range of motivations that cause a trainee to become a volunteer and continue volunteering. In this regard, the quality of position descriptions that informed recruitment is very important. From the outset, the organisation and the volunteer must understand and accept what each expects from the other - within the range of compatibility.	
How does the learning design address the anticipated motivations of the volunteer? This appears a very similar question to the above, but is different because it has to do with the learning comfort of individual trainees. Group (or even individual) acceptance of an overall learning goal is likely to be much easier to achieve than acceptance of the means of getting there. The issue here is that the internal motivations to learn are susceptible to undermining by an inappropriate learning pathway. What starts out as a keenness to get on with the learning may deteriorate because of a learning design that doesn't fit the needs and preferences of the learner.	

FACILITATING LEARNING AND CONDUCTING ASSESSMENT

B6.1 Using assessment to deepen the learning experience

In this guide, training and associated assessment are seen as potentially two sides of the same coin – they are joined together within the learning experience. The training facet involves acquisition of knowledge and skill through some form of structured learning experience. And the assessment facet, if appropriately constructed, deepens learning and can reduce the anxieties that many people feel in the lead-up to a test and when being tested.

In the volunteering environment it is especially important to offer training, and associated assessment, in a way that is welcomed by the volunteers – rather than being seen as a threatening imposition. Volunteers bring their experiences of schooling and other training to their volunteering; in some instances these will have been negative experiences. You probably know of situations where a person had difficulty in passing tests and might have given up on further learning because of this, but clearly knew their subject matter. Anxiety may be a significant factor in this, with such people succeeding with flying colours when their learning is assessed on an assignment/project basis. Volunteer training, and associated assessment, **must** be sensitive to the learning anxieties that some (maybe many) volunteers may have. As the assessment component of learning is probably the prime cause of concern, particular care is required in how volunteers are told about assessment and in how the assessment is conducted.

When you design assessment, remember that if assessment is to be reliable it should be conducted in circumstances that are as close as possible to a real situation – i.e. doing the job rather than being tested. For this reason, the somewhat artificial test approach which causes anxiety is not appropriate. It is much more reliable, and significantly less threatening to the learner, to offer opportunities for the learner to progressively demonstrate their increasing level of proficiency as they proceed through the training. The culmination of the training is a demonstration of their competency (knowledge and skill) in real circumstances. This may appear to be splitting hairs, but it is reasonable to expect that a volunteer is keen to efficiently/competently take on their role, and will derive motivation to learn from the goal of being applauded when they demonstrate that they can do the job.

Well designed assessment can contribute to the motivation to learn, and deepen learning through preparations for assessment, the activity of assessment itself, and feedback following assessment. And, there is the bonus that anxiety is reduced as a result of assessment being embedded in the learning rather than a 'pass or fail' single event.[13] Sensitively conducted, assessment should be a welcome acknowledgment of achievement and a motivation to engage in further learning. Do whatever you can to eliminate the notion that assessment is the type of 'testing' that might have caused a learner anxiety in the past.

[13] In a competency-based training environment assessment grading is either 'competent' or 'not yet competent'. If a candidate is assessed as 'not yet competent', further support for their learning is offered to bridge the competency gap and for them to be reassessed at a later time.

Having the trainee decide when they are ready for assessment

A best practice feature of competency-based training is that the trainee is empowered to decide when they are ready for final assessment and to have a say in how they will be assessed. This is done with the support of the trainer and/or the assessor if the trainer and the assessor are different people.

B6.2 Conducting a training program/session within the broader context of facilitating learning

In the *Guide for Training Volunteers (Part A)*, the point was made that the terms *training* and *learning* would be used interchangeably. However, at this point it is useful to make a distinction between the part of the overall learning experience which is commonly thought of as the training program (typically made up of a series of training sessions) and the other components of the learning experience.

Even though, as the trainer conducting a training program, you may initially think of yourself as just facilitating these sessions, you are probably facilitating a much broader process of drawing on existing knowledge and skill than you realise, and there is much more going on than the trainees focusing only on what is being presented in the session(s). Conducting the training session(s) is only part of facilitating the learning.

Figure 9 illustrates the relationship between learning components – including the training session – and how they make up the broad context of the learning experience.

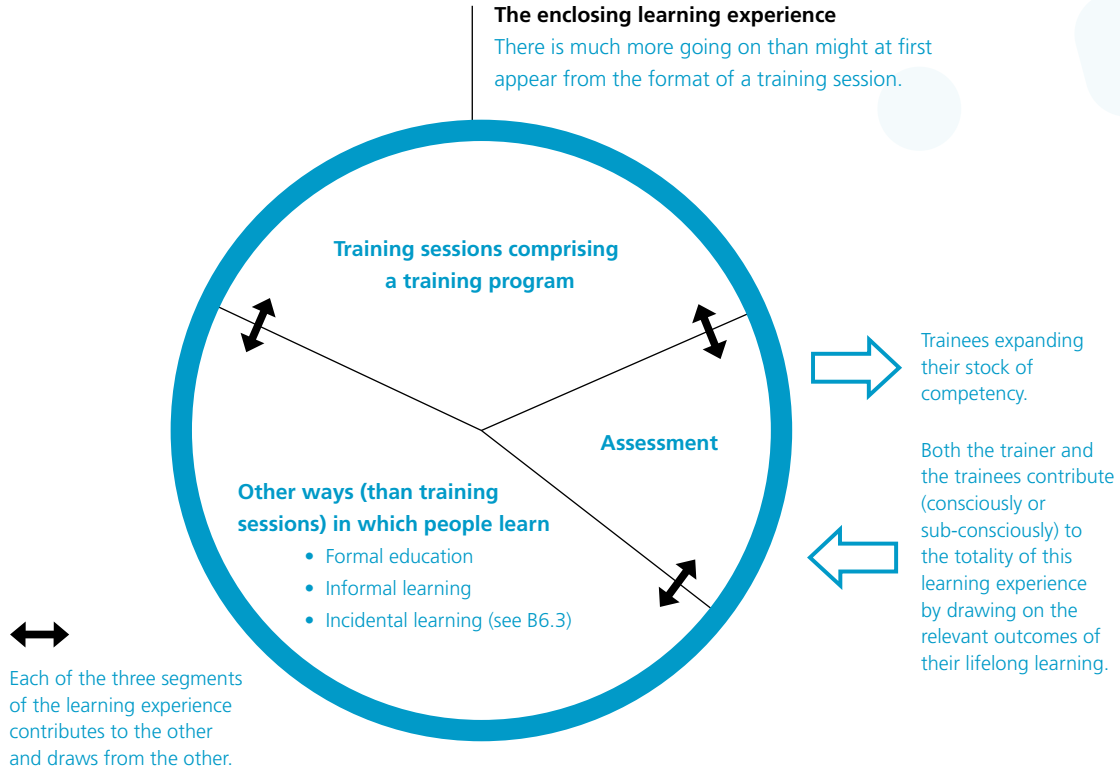


Figure 9 *The broad context of learning*

The following scenario shows how the dynamic illustrated in Figure 9 works:

After a training need (opportunity) had been identified, competencies specified, and an appropriate learning design prepared, the trainer and the trainees became engaged in a training program comprising several training sessions over a period of time. When the training program was first promoted, and especially when the trainees were being briefed, the holistic learning nature of the program was emphasised: there was a recognition that trainees' life experiences would be of value to the program and that throughout the program there would be progressive assessment of their strengthening capability. This assessment process would in itself – through feedback – be a significant feature of the program. As the program progressed, the trainees became more comfortable with sharing views and looked forward to the assessment tasks as a way of confirming their progress to themselves, adding to their learning, and as a means by which their efforts would be acknowledged by others.

The learning design sought to encourage the trainees to draw consciously on the breadth of knowledge, skills and experience acquired in their lives. This may have happened anyway – but in an ad-hoc manner – so it was considered best to overtly encourage them to make relevant use of their experiences. The learning design also included encouraging participants to see their volunteer training as relevant to other aspects of their life and to draw on it in these other contexts. It was considered that the benefit of the program would be maximised by everybody sharing relevant past experience and valuing the way in which the training program was adding to the stock of competency possessed by all – trainer and trainees. Often the trainer is also learning when there is a genuine learning partnership between the trainer and the trainee.

There was a clear reciprocal relationship between what was brought to the training program and what was acquired from it. A richness of learning arose from individuals sharing the relevant outcomes of their formal education and life experiences (informal learning). There were also times when a trainee realised that they actually knew more than they had realised – tacitly held knowledge became explicit in the course of sharing with others. The process of consciously building on pre-existing competency by adding newly acquired competency was recognised and valued by all.

The big surprise for many of the trainees was that the assessment components of the learning experience were valuable, non-threatening, learning experiences. Far from being anxiety-generating tests, the assessments were a comfortable, although challenging, part of the program. For some of the trainees the way in which the trainer achieved this made the trainer something of a miracle worker – for them, tests had previously been a major inhibitor to voluntarily undertaking learning.

Even when the trainees were confronted with the final assessment – with bringing it all together – anxiety didn't exist, as the assessment was clearly an opportunity to demonstrate, in a realistic manner, that they were competent to do the job. This confidence existed because the trainees (candidates for assessment) had already demonstrated capability regarding the 'bits' and it was now just a matter of showing that they could put it together. And even if they missed out on some point, they had an opportunity to revisit this issue and bridge the gap.

Figure 10 is offered as a tool to help you plan and monitor a training program which consciously makes use of volunteers' own experience and draws advantage from assessment being regarded by the volunteers as a learning experience (and not just something that happens at the end of the program, although this may be the only time that assessment formally occurs).

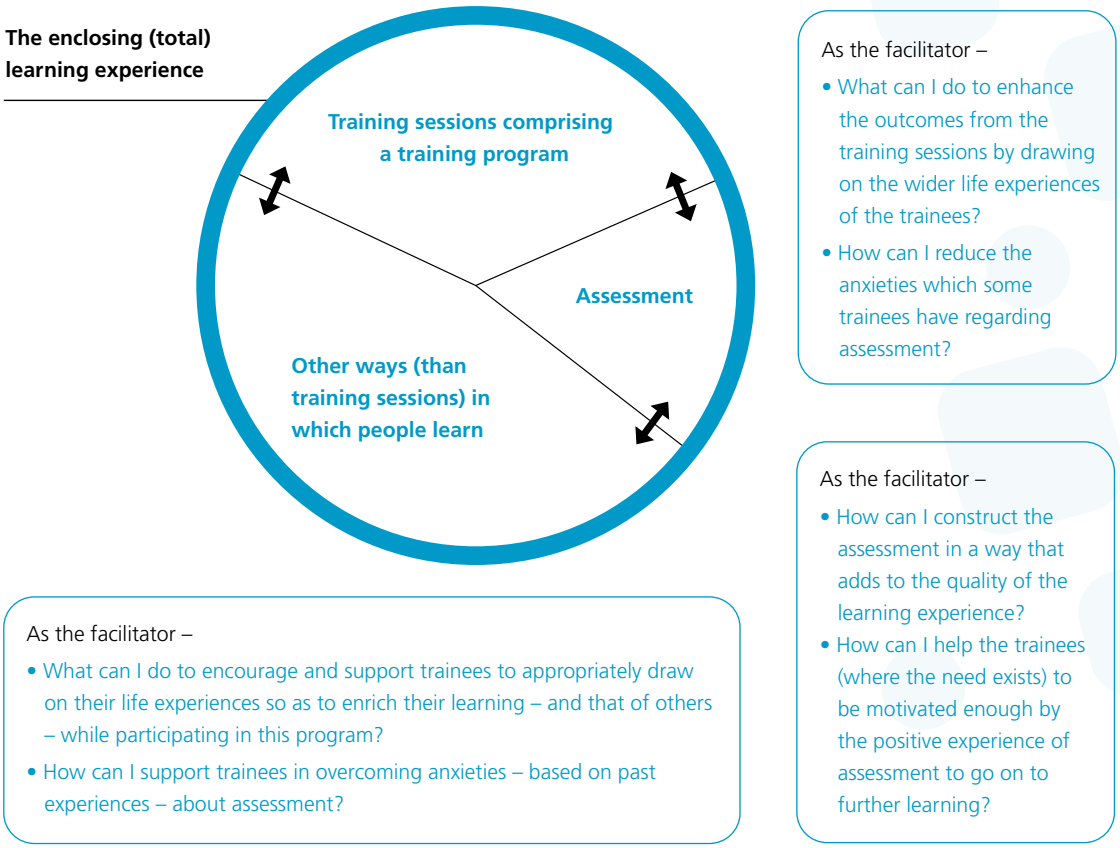


Figure 10 *Useful questions for the facilitator*

How might the diversity of volunteers' backgrounds in your organisation be an enriching feature of volunteer training?

Seek out the views of some volunteers on this question.

B6.3 Formative and summative assessment

Earlier in this toolkit, drawing on Mager (1968), the advice was given that knowing how you are going to assess 'arrival' in the learning journey is one of three key elements in learning design. The other two elements are:

- knowing where you are going (the competency/ies), and
- knowing how you are going to get there (the structure of your training program).

Each of these three elements informs the others when you design the training and must be kept in mind when you facilitate the learning. After analysing the competency, a learning designer will often begin the learning design process by thinking about how, in the delivery of this training program, achievement of competency is actually going to be assessed – knowledge of the end of the journey helps to plan the journey.

Why assessment is not an optional extra

Some trainers of volunteers can feel that because much of their training is really just a matter of passing over information and giving advice, it does not require assessment. Also, it is sometimes believed that assessment is not welcomed by volunteers. A response to this view is that, no matter how brief and limited in scope the training, all training requires assessment of acquired competency. If this is not the case, then why do the training? The learner and the trainer both need to know whether the trainee is competent to do the job, and the trainer needs to know whether the training program is meeting its objective. And the people who will be depending on the volunteer are entitled to have confidence in them. If assessment – in suitable form – is not part of a training program, then it is not a training program. It is just not appropriate to be addressing a need through training and not assessing the competency outcome.

There are two categories of assessment relevant to Training Packages and to competency-based training in general:

- **Formative assessments** are made periodically throughout a training program and are optional, although highly recommended. The principal purpose of formative assessments is to monitor and facilitate feedback about a trainee's progress, but they can also be taken into account at the time of final assessment.

  Considerations such as the time period over which the program is conducted, and the complexity of the target competency, are among the issues which influence the decision to embed formative assessment within the program. The longer it takes to deliver the program, and the greater the program complexity, the more useful it is to make formative assessments. However, even in a short training session of a couple of hours, periodic checking through questioning and other forms of feedback from the trainees is very useful to the trainer and the trainees.

- **Summative assessments** are made at the conclusion of a training program and are mandatory. Learning progresses throughout a program, and even though a candidate's competency may have been assessed element by element through formative assessment, the specified competency requires the trainee to be able to put all the components of the learning together in an integrated way. And so a summative assessment is required as the closing phase of a training program.

Although summative assessment is notionally placed at the end of a training program, there is an expectation that competency will be demonstrated and observed over time and that multiple types of evidence of competency will be drawn on. The following two stories illustrate bad summative assessment practice and good summative assessment practice respectively.

Bad (not acceptable) summative assessment

As the last part of the final day of a training program to develop volunteer competency to *Follow OHS procedures*[14] – six hours per week over four weeks – the trainer handed out an assessment sheet comprising a combination of thirty 'True or False' and 'Multiple Choice' questions. The trainer had not mentioned this to the trainees earlier in the program and the language and literacy competency of the trainees hadn't been considered.

Comment

The assessment had only one dimension – testing knowledge – and was weak even in this. The trainees were ambushed and there wasn't any consideration of whether individuals would face language and literacy difficulties. Competency (knowledge and skill) could not be assessed by this approach, and the assessment was of no value in enriching learning. Some of the trainees would not only have been aggrieved by the process, but would probably have felt that the program was weak.

Good (best practice) summative assessment

At the beginning of a training program to develop volunteer competency to *Follow OHS procedures* the trainer discussed the type of assessment she had in mind and invited the trainees to comment and to suggest ways they could be assessed which would suit their individual circumstances. The program was scheduled as six hours per week over five weeks. The fifth week was set aside for assessment in a form to be agreed between trainer and trainees, but within a flexible framework that the trainer had constructed as suited to the target audience. The outcome of the discussion was agreement on a general assessment format as follows.

(a) Prior to the fifth session a written or oral (trainee's choice) open book knowledge test probing understanding. The test would be done in the trainee's own time and managed to fit in with the trainee's circumstances. Although it would be a significant load on the trainer/assessor, oral probing of knowledge and understanding could be done by telephone or tape-recorded.

(b) The fifth session would commence with a review of outcomes from the knowledge and understanding questions and then move into observed performance in a role-play. The format of the role play assessment was for the trainees to be divided into small groups, and each group devising a scenario to be performed by another group followed by discussion – noting (with trainee awareness) the general level of contribution being made by each trainee.

(c) Submission of a work-based assignment/project (agreed between trainee, trainer, and possibly a third party in the workplace) undertaken during the four weeks following the last session, with some provision for extension of time if required by the trainee. A third party (team leader, supervisor, or other appropriate person) report would accompany submission of this assignment/project.

Comment

The approach to assessment had strong features beginning with an up-front discussion about assessment which, in addition to giving the trainees appropriate influence, served to join the learning with assessment so that assessment was seen as an integral part of the program rather than an unwelcome add-on. The approach also gave the trainer an opportunity to deal responsively with individual trainees' special needs and the circumstances of their workplace. Throughout the program, everyone had the role-play and assignment/project in mind and so these were included, to some degree, in the learning. In addition to allowing her to review the quality of trainees' learning, the process for developing the role-play in particular gave the trainer the opportunity to quietly observe the individual contributions being made to the formulation of the scenarios. While this was not a formal part of the assessment it did give some insight into individual strengths and weaknesses, which assisted the trainer to identify where extra support – during the assignment/project period – was required and possibly where some trainee-to-trainee help could be sourced. The assignment/project had multiple attributes. It assisted with transfer of the learning to the workplace, it was a device for demonstrating competency over time, it gave the trainee the opportunity to have some control over when they felt it was appropriate to submit, and it engaged a third party from the workplace with the learning. The assignment/project approach also gave the space/opportunity for a trainee who was initially assessed as not yet competent to be supported.

[14] (CHCOHS201A) *Follow OHS procedures* is a unit of competency within the (CHC02) Community Services Training Package and is a core competency in Certificate II in Active Volunteering.

B6.4 Principles of assessment and rules of evidence of competency

Whether the assessment is of a formative or summative nature, there are four qualities it must have, now commonly referred to as assessment principles. The assessment process must be *valid, reliable, flexible* and *fair* as described below.

An assessment is **valid** when the process is directed at what it claims to assess – i.e. it assesses the competency/ies as specified.

For example

If the competency of a volunteer fire-fighter to select and properly use the appropriate fire extinguisher (to suit different types of fire and the fire environment) was being assessed, but the candidate was actually only questioned about one type of fire and not even required to demonstrate use of an extinguisher, this would not be a valid assessment. Questioning alone is not sufficient to assess the full scope of the competency.

An assessment is **reliable** when it is conducted in a manner that ensures consistency – i.e. a different assessor would make the same judgment of a candidate's competency.

For example

When assessing *CHCCS405A Work effectively with culturally diverse clients and co-workers*, it would not be reliable for an assessor to find a candidate competent by primarily focusing on only one of the four elements (e.g. CHCCS405A/04 *Resolve cross-cultural misunderstandings*) that make up the unit of competency, and then just ask some questions touching on the other three elements of competency. A more diligent assessor in the same circumstances would make a different assessment where the candidate was found to have variable competency across the four elements – e.g. the candidate might have correctly answered questions about *CHCCS405A/03 Communicate effectively with culturally diverse persons*, but not be able to demonstrate that they actually had the skill to apply this knowledge.

An assessment is **flexible** when there is proper consideration of the needs of all parties involved in the assessment – i.e. it can be adjusted to suit the circumstances.

For example

It may be necessary to set a time and place for the assessment that takes due account of the availability of the parties to the assessment and/or does not unduly disrupt the activities of others. This might apply when conducting an assessment in the workplace. There may also be a need to apply an assessment method which is especially suited to the candidate and/or the environment in which the assessment is to occur.

An assessment is **fair** when the candidate and the assessor have agreed on the assessment process, the candidate clearly understands the process, and the process gives due regard to the characteristics of the candidate. In other words, the assessment is clearly and properly based on the competency, the candidate is empowered to participate in setting a process which is free from discrimination and bias, and the candidate is not placed at a disadvantage by the process.

For example

It would not be fair to require a candidate with significant language and literacy limitations to respond to questions requiring reading and then writing. It would not be fair to add demonstration of competency requirements beyond what is specified in the endorsed unit of competency. It would not be fair to deny a candidate the right of appeal against an assessment.

Following from the four principles of assessment, there are four rules of evidence relating to *validity, sufficiency, currency* and *authenticity.* (These explanations are drawn from the (TAA04) Training and Assessment Training Package, p.30. However, they do have generic application across Training Packages.)

Evidence of competency is **valid** when it relates directly to the requirements of the competency standard. Assessors must ensure that the evidence collected does demonstrate the outcomes and performance requirements of the competency standard, together with the knowledge and skills necessary for competent performance. Valid evidence must be valid for the breadth and depth of the competency standard. This will necessitate using a number of different assessment methods.

Evidence of competency is **sufficient** when the amount of evidence collected is enough to show that all aspects of the competency standard have been covered and that the performance can be repeated by the candidate – i.e. it is not a once-off. Supplementary sources of evidence may be necessary.

Evidence of competency must demonstrate **current** performance, so the evidence collected must be recent. This is particularly relevant when candidates seek recognition of existing competence through an assessment-only pathway.

Evidence of competency is **authentic** when it relates to the candidate alone and not another person. Where the candidate relies on indirect or supplementary forms of evidence, or the direct evidence is not directly observable, other complementary evidence that supports authenticity may need to be provided.

Template 6 is offered as a tool for auditing your assessment planning against the assessment principles and rules of evidence above.

Template 6 *Audit of alignment/compliance with assessment principles and rules*

Assessment details: (The competency being assessed and under what circumstances – who, when, where, etc.)			
Assessment principle	The assessment features which demonstrate alignment with the assessment principles	**Evidence rule**	The assessment features which demonstrate compliance with the evidence rules
Validity		Validity	
Reliability		Sufficiency	
Fairness		Currency	
Flexibility		Authenticity	

Note: In addition to being a part of due diligence, conducting such an audit reveals opportunities for strengthening the assessment approach in a way that adds to the quality of the overall learning experience.

The process of assessment and developing assessor competency is a large topic and beyond the scope of this guide to address fully. Accordingly, it is suggested that you refer to the (TAA04) Training and Assessment Training Package (pp. 27–43) as a scoping guide. This Training Package is directed at the training of trainers and it is a useful resource for you to draw on as an overview of trainer competencies as they relate to you.

Table 2 lists the elements of competency for each of the four core assessment units of competency within the (TAA40104) *Certificate IV in Training and Assessment*. In addition to highlighting the assessment planning, implementation and review issues, this overview of the competencies can be used to audit your own practice. After looking at the performance criteria and other details[15], how might you be able to demonstrate current competency and claim RPL?

Table 2 *Overview of TAA04 assessment competencies*

(TAAASS401A) Plan and organise assessment	**(TAAASS402A) Assess competence**	**(TAAASS403A) Develop assessment tools**	**(TAAASS404A) Participate in assessment validation**
Elements of competency	**Elements of competency**	**Elements of competency**	**Elements of competency**
Define focus of assessment Prepare the assessment plan Contextualise and review assessment plan Organise assessment arrangements	Establish and maintain the assessment environment Gather quality evidence Support the candidate Make the assessment decision Record and report the assessment decision Review the assessment process	Determine the focus of the assessment tool Determine assessment tool needs Design and develop assessment tools Review and trial assessment tools	Prepare for assessment validation Contribute to validation process Contribute to validation outcomes

Note: These competency specifications – and others from the TAA04 Training and Assessment Training Package – are sufficiently detailed that you can infer from them the required processes. There is also the potential for you to draw on these documents for the purpose of guiding self-directed learning.

Review the variety of forms of training with which you are involved and identify the ways in which the Training Package principles and rules of assessment best fit. It would not be surprising if your first reaction is that these principles and rules appear to be too formal for much of the training you facilitate, as you are not engaged in awarding formal qualifications. However, on taking a second look, you may find that the principles and rules do apply, but maybe in a modified form.

It is important to remember that your volunteers may be seeking RPL arising from their past volunteer training and experience. Where this is the case, being able to show that they were appropriately and rigorously assessed would be of significant advantage.

[15] Go to www.ntis.gov.au. Click on 'Training Packages' in the Browse NTIS box. Scroll down the list and click on TAA04. Click on 'Download Training Package' in the Tools box, then follow the directions for downloading.

B6.5 Valuing what volunteers already know and can do

The strength of a volunteer-involving organisation principally resides in its volunteers. And, in turn, the contribution which a volunteer makes comes from the knowledge and skills they bring to the organisation, and what they add to this competency through their training and other learning in the course of their volunteering. You, as a trainer, have a key role in acknowledging, valuing and drawing on what a learner already knows and can do when they join a training program, and then in supporting the trainee to build on this – as shown in Figure 9. Also, as mentioned earlier, your trainer role will include helping trainees to recognise that they bring much to the program, and to value that.

There is a tendency in our community for people not to fully value what they know and can do, and not to fully value what others know and can do. In the case of volunteering, this can lead to underutilisation of what a volunteer brings and is a lost opportunity to strengthen their motivation to continue volunteering. It may even have a negative effect on retention. Hughes and Henry (2003) commented upon the valuing of learning outcomes within a Country Fire Authority brigade[16] that:

> There are two parties to this valuing of learning outcomes – the volunteer as an individual and the brigade as a unit. Both of these parties must value the outcomes from learning and recognise that the other reciprocates. If the volunteer values his/her outcomes from learning, but the brigade does not, then dissatisfaction and frustration are probable outcomes leading to quitting the brigade. It could be the case that the volunteer is keen to contribute in an expanded (beyond conventional/minimal) manner, but the brigade is disinterested. It is also possible that the brigade may have a high level of valuing learning outcomes, but the volunteer may feel threatened or not even recognise that they have much to offer. Under these circumstances the brigade must take steps to assist the volunteer to recognise that he/she does indeed have much to offer. In the absence of this nurturing of the volunteer, the volunteer may leave because of perceived threat or a feeling of just not fitting in.
>
> (Hughes and Henry 2003, p.27)

There is self-evident logic in asserting that a volunteer keeps on volunteering because of the personal satisfaction that they get from being a volunteer, or because they have achieved some valued personal goal through being a volunteer. However, it may not be as self-evident that this is closely linked to the value placed on learning outcomes – i.e. what the volunteer knows and can do – across a very broad spectrum. As a trainer, you are in a position to make a significant contribution to this motivation factor, which can get lost in the mass of issues and pressures being managed by your organisation. Sometimes it is just a matter of encouraging a volunteer to reflect on what they have accrued as knowledge and skill through various pathways and then supporting them to draw on this both in the course of training and, importantly, in transferring the outcomes of their training to the workplace. Template 7 may be helpful in this regard.

[16] An extract from '*Volunteers as a learning bridgehead to the community*', a paper presented to the October 2003 Emergency Management Australia conference and subsequently published in the November 2003 edition of the *Australian Journal of Emergency Management*. The paper arose out of Lewis Hughes's research into the relationship between making the most of what a volunteer knows and can do and increasing retention of CFA volunteers.

Template 7 *A volunteer drawing upon their breadth of knowledge and skill*

Sources of knowledge and skill Foley (1995, p. xv) acknowledges blurred boundaries between non-formal education, informal learning and incidental learning.	**Strategies for drawing on the trainee's existing (incoming) knowledge and skill during training**	**Strategies for supporting a trainee in transferring their expanded knowledge and skill to the workplace**
Formal education The most familiar form of education, delivered by professional educators and frequently leading to qualification.		
Non-formal education Specific learning or training to meet some sporadic workplace or life need.		
Informal learning Conscious learning by drawing from experience but without facilitation by a professional educator or trainer.		
Incidental learning The frequently tacit learning which an individual acquires through engagement with life and their work but which is not consciously recognised as learning when it takes place.		

Note: This template draws on Griff Foley's categories of adult learning (Foley, 1995) and is offered as tool a trainer can use when planning how to assist a learner to draw on their lifelong learning during training, and when transferring what they have learned to the workplace.

Contact some past trainees and ask them what experience, with the benefit of hindsight, they thought was of special value that they brought to the training. Did they see this experience in knowledge and skill terms?

Also ask these past trainees what aided and what inhibited them in applying in the workplace what they learnt from the training. Do they really consciously value the full extent of all that they know and can do which is relevant to their volunteering role?

B6.6 Facilitating learning pathways

As a trainer, you are potentially engaged in facilitating training in a number of different ways. These are sometimes called learning pathways. The following training formats are examples of different learning pathways:

- conducting group-based training sessions off-the-job;
- supporting a trainee (or a group of trainees) to acquire knowledge and skills while working on-the-job;
- facilitating individual learning through a one-on-one relationship.

Each of these formats is the subject of a unit of competency within the (TAA40104) *Certificate IV in Training and Assessment* – see Table 3.

Table 3 *Overview of training delivery and facilitation competencies in TAA40104*

Note: As for other TAA04 competencies, the detailed specifications are a useful guide to the processes and are also a benchmark for self-assessment of your own practice.

(TAADEL402A) Facilitate group-based learning **Elements of competency**	(TAADEL404A) Facilitate work-based learning **Elements of competency**	(TAADEL403A) Facilitate individual learning **Elements of competency**
Establish an environment conducive to group learning	Establish an effective work environment for learning	Identify individual learning facilitation requirements
Deliver and facilitate training sessions	Develop a work-based learning pathway	Establish the learning/facilitation relationship
Demonstrate effective facilitation skills	Monitor learning and address barriers to effective participation	Maintain and develop the learning/facilitation relationship
Support and monitor learning	Review the effectiveness of the work-based learning pathway	Close and evaluate the learning/ facilitation relationship
Review and evaluate effectiveness of delivery		

The 'Facilitating learning pathways' title of this topic is very deliberate. As a trainer, your contact with a trainee is not always in the form of what can be clearly identified as a training session, although there is a common facilitating core structure as summarised in the following and illustrated in Figure 11.

Facilitating the learning pathway

Phase 1 **Defined objective**

Whether the delivery is in a classroom setting, on-the-job, or even in a distance learning mode, the first 'where are you going' phase is to have specified the competencies to meet a confirmed training need or opportunity. This training needs analysis will have also informed the choice of learning pathway, e.g. off-the-job group sessions, on-the-job supported learning, one-on-one learning/coaching, online learning, etc.

Phase 2 **Promote the program and prepare for delivery and assessment**

In all training/learning delivery modes there is a need to promote the program to potential participants and those (gatekeepers) who are influential in supporting participation by the learner. The other aspect of this phase is the obvious importance of identifying the resources needed and ensuring that they are available on the day(s) – easy to say, sometimes not so easy to achieve. This preparation phase also includes ensuring that the trainees are available and can attend when contact is required – again, easy to say, but sometimes not so easy to achieve.

In essence, as the trainer, you must ensure:

- you are personally well prepared – you know the subject matter, have some insight into learners' special needs and learning preferences, and have the necessary learning resources available;
- the venue – training room, worksite, learner's environment – is conducive to learning;
- trainees know what is expected of them and have made whatever personal preparation is required (a briefing outline and a checklist for trainees are helpful);
- people who are influential regarding access to the trainees and/or influential in application of the learning outcomes are informed and co-operative;
- people who provide services are informed and ready – e.g. trainee special needs support, catering staff, security personnel, audio-visual technician, etc.

It is helpful to create a checklist of what you need for your program and to update it in the light of experience. Even in the case of one-on-one training, a continually improved checklist is helpful – the unexpected can always happen. The care which you put into preparation is the foundation on which successful learning outcomes are achieved and your own enthusiasm as a trainer is maintained and enhanced.

Phase 3 Actual facilitation

Whether you are facilitating learning for a group or just one individual, the special needs – language, literacy, numeracy limitations, disability considerations, cultural influences, confidence-building needs, etc. – of all individuals must be catered for (within reason).

Ensuring that the environment is conducive to learning is important. This includes physical aspects such as that the environment is comfortable, free of distractions, safe, etc. And, very importantly, all who are involved should have enthusiasm for the learning – this goes beyond just the trainee(s) and the trainer to include others who have an influence on the program and a stake in its outcomes. When you are facilitating learning in the workplace, there will be a requirement to inform and make arrangements with people such as supervisors and work colleagues who may be involved in or affected by the training activity.

Supporting the learners to learn is the core of this phase. This may appear self-evident, but it is possible that as a trainer you will become more focused on what you are doing than on what the trainees are doing. The following checklist offers a procedure to guard against this.

- Do the trainees have a clear understanding of the need to be met and the learning goals to be achieved? And do they agree with this?

  How will you maintain this commitment by the trainees throughout the program?

- Are the trainees confident that they can achieve the learning goals? And are they aware that you are supporting them with a range of learning pathways that suit their learning preferences and special needs?

  How will you maintain the trainees' confidence throughout the program?

- Have other people who may be involved in or affected by the training been informed? And have appropriate arrangements been made?

  How will you maintain liaison with these people throughout the program?

- Are the trainees aware that you value what they bring to the learning experience? And are they confident that you will draw upon this in a manner which is comfortable for them?

  How will you maintain this input by the trainees throughout the program?

- Do the trainees understand that you expect them to be actively engaged as learners? And are they confident that you will support them in doing this in a way which is within their capacity and suited to their preferred learning style?

  How will you, throughout the program, encourage active participation by all as is appropriate to them?

- Are the trainees aware that an important part of your support for them is monitoring their progress and giving feedback? And do they welcome this?

  How will you monitor progress in a way which motivates the trainees?

- Do the trainees understand that assessment by demonstration of competency (as appropriate to the objective of the program) is a significant component of the learning experience? And do the trainees value this?

  How will you ease anxieties, where they exist but may be difficult to detect, regarding assessment?

Phase 4 Assessment and evaluation

Having designed and implemented a training strategy to meet a need (or opportunity) it is clearly proper that you evaluate to what extent the objective has been achieved. Three questions embracing both competency assessment and program evaluation are suggested as useful focus points and are more fully addressed in section B7 of this toolkit:

- Have the trainees achieved the target competency?
- Has achievement of the target competency resolved the organisational problem (or contributed to acting upon the opportunity) that led to identification of the training need?
- Has the training program been designed and implemented as well as possible, or is there a need or opportunity for enhancement?

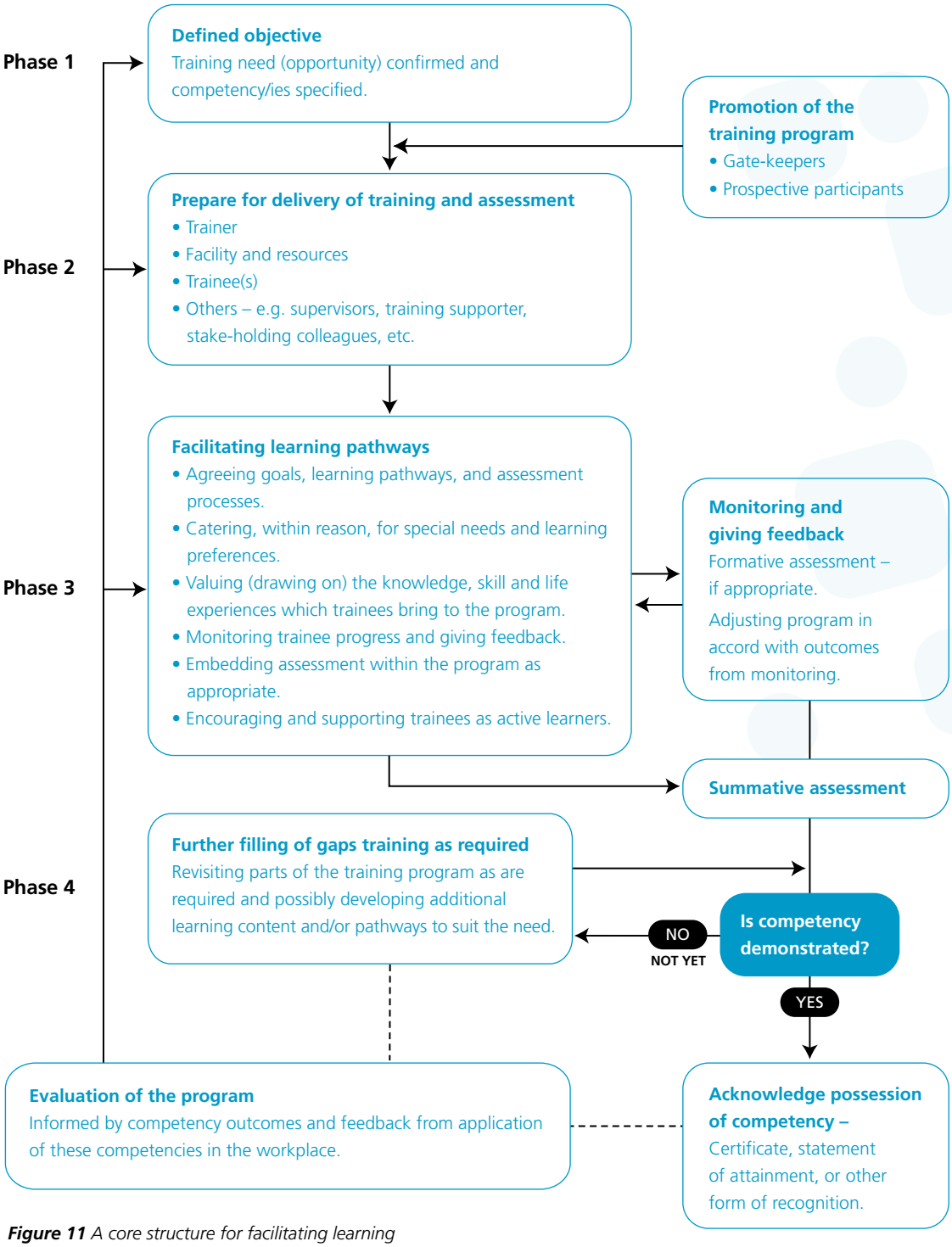


Figure 11 *A core structure for facilitating learning*

Rural Co-Pilots Volunteers

EVALUATING THE TRAINING PROGRAM

In a volunteer-involving organisation, a training program is a response to a need (or opportunity) to expand the competency of a target group of volunteers and/or staff in order to achieve the organisation's goals and, importantly, to satisfy the volunteers' personal motivations in a way which is consistent with their role. Given this, it is clearly good practice to have a process in place which reviews the quality of the training program outcomes and evaluates whether the need (or opportunity) which gave rise to the training program has been satisfied.

What if training fails to deliver organisational goals?

It could happen that a training program has high quality outcomes in terms of the trainees acquiring the specified competencies, but without the organisational goals being met. There is a possibility that the training was wrongly conceived or in some way misdirected in terms of meeting the organisational goal. The training needs analysis might even have been well done, but something has happened subsequently to inhibit effective transfer of the learning outcomes to the workplace. For example, there may have been a change in resource availability, the technology may have changed, there may be people who are inhibiting the transfer, or even the nature of the problem may have changed. It could also be that the assessment of trainee competency was flawed and the earlier belief that there were high quality outcomes was wrong.

In addition to auditing training outcomes against the reasons for implementing the training, it is also best practice to strive for continuous improvement. Taking into consideration both of these factors, training program evaluation is a very large topic and beyond the scope of this guide. However, the opportunity is taken to alert you to the issues and to offer a starting point to consider the questions foreshadowed in phase 4 of 'Facilitating learning pathways' (B6.6).

B7.1 Leading and conducting training and/or assessment evaluations

Reviewing the *(TAACMQ503A) Lead and conduct training and/or assessment evaluations* is a suggested starting point for designing and implementing a suitable monitoring process to help you keep your training delivery on track as a major contributor to organisational achievement. (This is a diploma level unit of competency, indicating the important status of this training function.)

While it is highly recommended that you print out the complete competency specification as available on the National Training Information Service (NTIS) website – www.ntis.gov.au – the elements of competency and performance criteria are reproduced as Table 4.

Table 4 *(TAACMQ503A) Lead and conduct training and/or assessment evaluations – Elements of competency and performance criteria*

National Code	Element Name
TAACMQ503A/01	**Identify the basis for the evaluation** 1.1 The purpose, objectives and scope of the evaluation are determined and confirmed with relevant persons 1.2 Previous relevant evaluations are accessed and reviewed, where appropriate 1.3 Relevant framework and criteria for conducting the evaluation are identified and interpreted 1.4 Appropriate evaluation models/methods are considered and selected in accordance with purpose, scope and operating context, and appropriate instruments are developed
TAACMQ503A/02	**Plan evaluation of training and/or assessment services/system** 2.1 Specific organisational documentation/information required for the evaluation is sourced and collated 2.2 Persons to be involved in the evaluation process are determined, consulted and roles and responsibilities are confirmed 2.3 Resources to perform the evaluation are determined 2.4 A schedule is drawn up outlining timing of the evaluation process 2.5 A communication strategy is developed to inform all parties impacted by the evaluation 2.6 A risk analysis of factors/issues impacting on evaluation process/outcomes is undertaken 2.7 An evaluation plan is written, documented and approved by relevant personnel, where required
TAACMQ503A/03	**Conduct evaluation of training and/or assessment services/systems** 3.1 Specific organisational documentation/information relevant to the evaluation focus is analysed in accordance with evaluation criteria, and key points are noted 3.2 Relevant persons are interviewed using interview skills/questioning techniques to clarify points and to obtain further relevant information 3.3 Training and/or assessment processes and operating systems are observed to confirm documentary and interview based evaluation evidence 3.4 Communication and interpersonal skills are used to maintain a professional focus 3.5 Records and notes of all evaluation proceedings are documented
TAACMQ503A/04	**Determine and report evaluation outcomes** 4.1 Records/notes of evaluation process are analysed and information is synthesised to provide the basis for determining evaluation outcomes 4.2 Identified issues are considered and further information is collected, where required 4.3 Evaluation outcomes are determined 4.4 Final report is prepared and filed in accordance with evaluation policy and procedures 4.5 Results of the evaluation outcomes are communicated to the target audience in a systematic and timely manner 4.6 Follow-up actions are instigated, where relevant

If you don't already have some form of evaluation process for your training program in place, Figure 12 could be a useful base from which to structure one.

If you have read beyond the Table 4 extract from TAACMQ503A (by accessing the full specification of the unit of competency) you will be aware of the depth and rigour that is required for an evaluation of training and/or assessment evaluation carried out with due diligence. However, if this process is new to you and you now set about conducting an evaluation which goes beyond seeking feedback from trainees at the end of a program, you will find that it is very rewarding. The reward typically takes the form of feeding continuous improvement, enhancing the status of training and assessment in the eyes of stakeholders who are consulted, and improving the transfer of learning outcomes to the workplace because of the increased awareness of value on the part of those who you *strategically*[17] involve in the evaluation.

[17] There is a lot to be gained by seeking client views on how satisfied they are with your training and assessment product.

In view of the above, Figure 12 is an overview of a suggested process to help you come to terms with what might at first appear too daunting a process. The following are some points regarding the intent of the diagram:

- At the time of confirming the need or opportunity that has given rise to the training program, it is good practice to articulate a strategy to monitor success (or otherwise) as the program proceeds so that remedial adjustments or adjustments that build advantage can be made. For this reason, the monitoring of trainee progress during the program becomes part of your facilitation strategy and may lead to adjustment of your strategy.

- Once the program has concluded, it is highly desirable (arguably, mandatory) to have a strategy in place to evaluate outcomes from the program after an appropriate interval.

- The listing of potential outcomes (see bottom right hand of Figure 12) indicates that the evaluation process informs continuous improvement and, if you play your cards well, it can yield very helpful applause even where some deficiency, demanding attention, is revealed. In this regard, it is useful to bear in mind that in a continuous improvement environment which is thought of as being a good outcome today is often regarded as not good enough when looked at tomorrow.

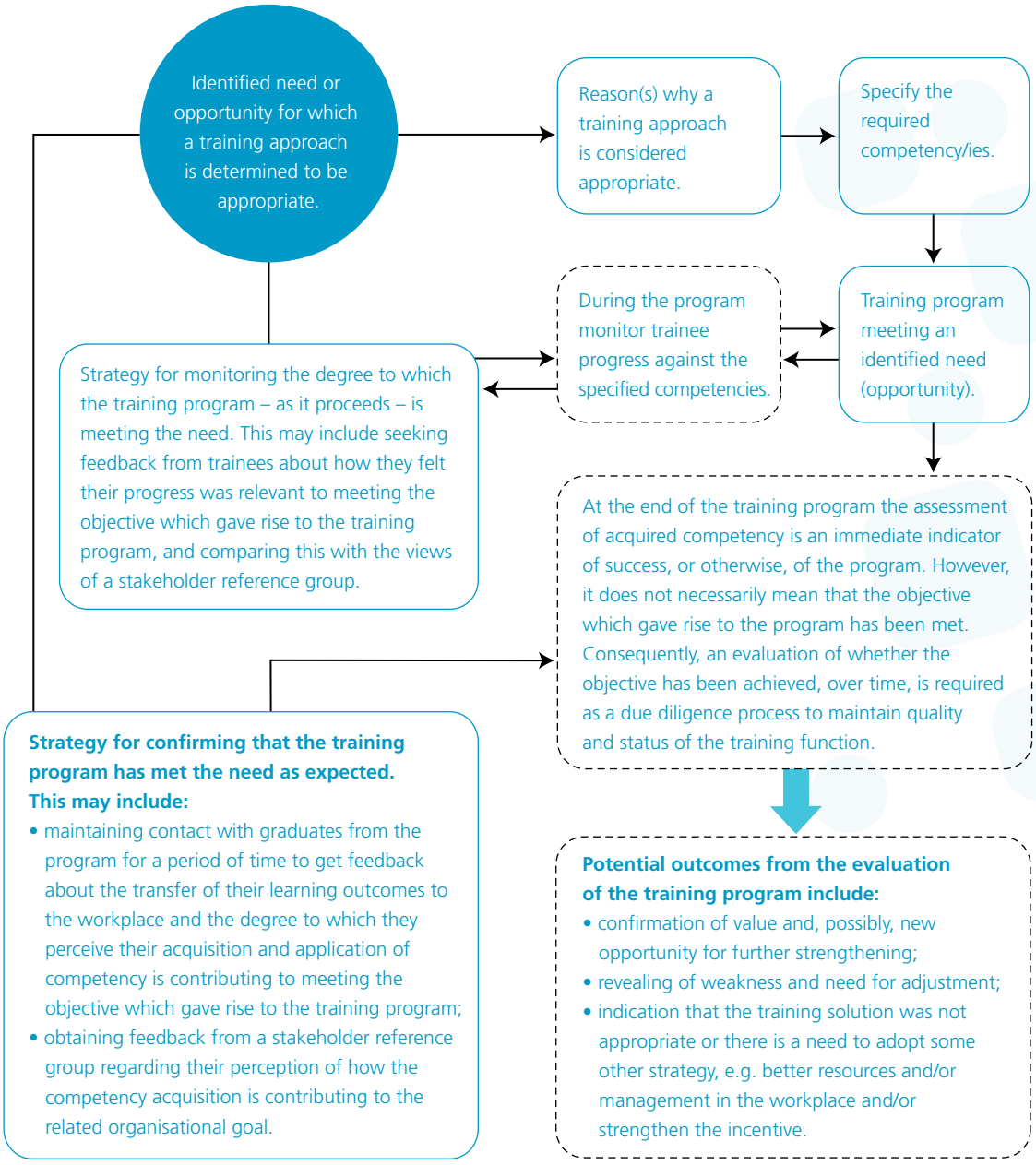


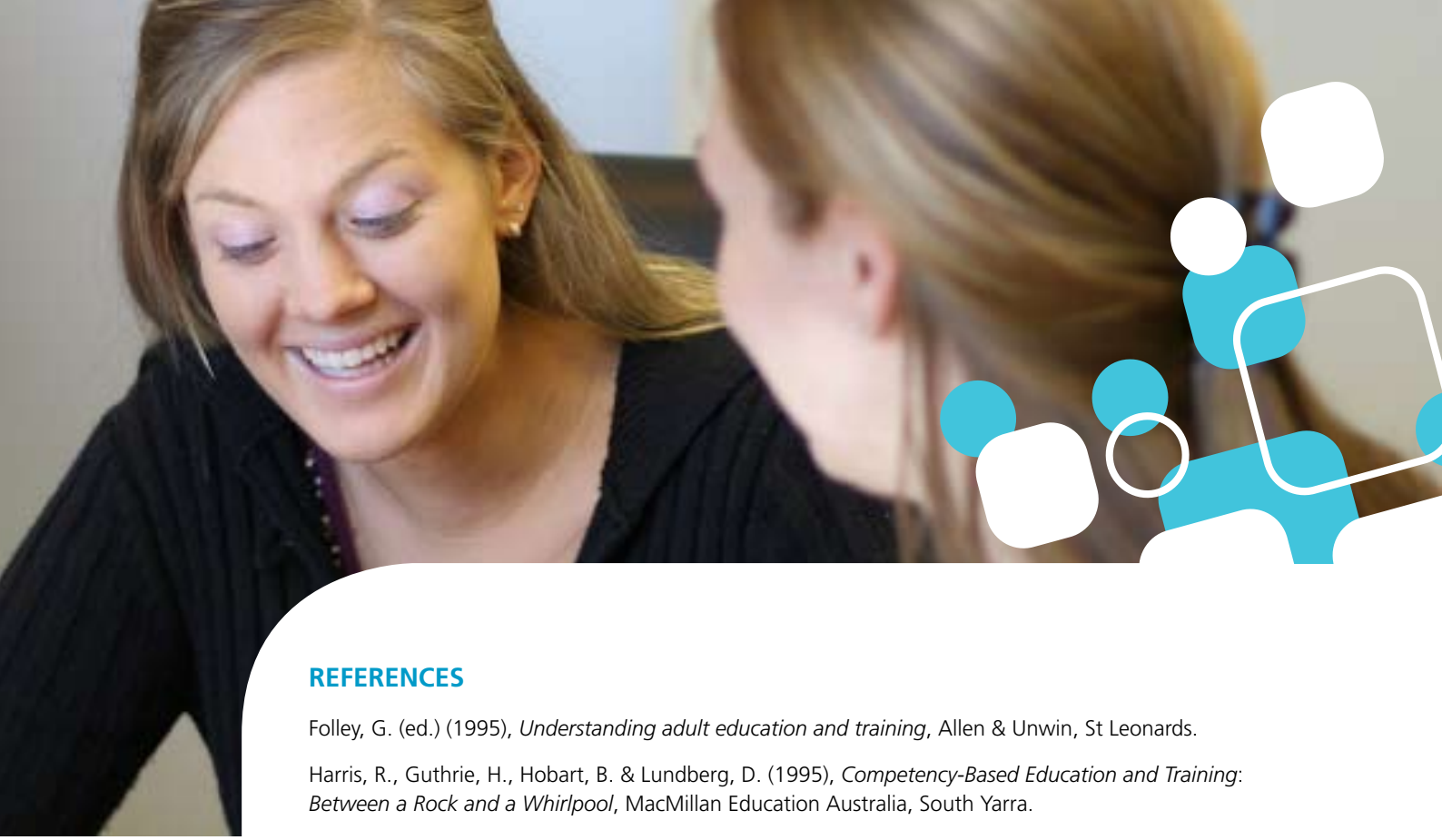
Figure 12 *Training program evaluation strategy – a suggestion*

If you are not already familiar with the notions underpinning the concept of '*Learning Organisations*' you may find it interesting to explore this topic from the perspective of the status of training in your volunteer-involving organisation, and the strategic value, to you as a trainer and to your trainees, of involving stakeholders in evaluation of training and assessment outcomes.

This brings us to the conclusion of this toolkit. We trust that the *Toolkit for Training Volunteers (Part B)* will assist you in your role as trainer in some real, practical way.

As mentioned at the outset, this guide is one half of a resource which, when used together, will assist trainers of volunteers to achieve best practice in the design and delivery of training. *Part A, A Guide for Training Volunteers*, reviews the training environment issues that shape how volunteers are trained, and supports trainers to analyse this environment. We recommend you draw on this guide, as it will assist you to carry out the ideas and strategies discussed in this toolkit, and make the most of what volunteers know and can do.

Volunteering Australia is always keen to improve the resources we develop and we encourage our readers to send us feedback. If you have any suggestions or comments which will help us improve this toolkit, please email us at: volaus@volunteeringaustralia.org



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USEFUL WEBSITES

The Australian Council for Adult Literacy, www.acal.edu.au

The National Centre for Vocational Education Research (NCVER), www.ncver.edu.au

The Department of Education, Science and Training, www.dest.gov.au

The National Training Information Service (NTIS), www.ntis.gov.au

Volunteering Australia, www.volunteeringaustralia.org