

VOCATIONAL TRAINING AND ASSESSMENT

A COMPLETE COURSE FOR **TAE10**
CERTIFICATE IV IN TRAINING AND ASSESSMENT

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Foreword

It is no secret that human behaviour and the nature of human interaction have always been prime causes of good and evil. From interpersonal relationships to organisational performance, or even international diplomatic interactions, all depend on the qualitative competence and knowledge of the respective decision makers and the influence of their mentors in achieving set objectives.

The provision of relevant knowledge, appropriate proven procedures, and techniques that can be used to improve the performance, efficiency, productivity and satisfaction of any organisation and its members are the paramount responsibilities of today's educators. If you don't train the trainer properly, you will surely miss objectives, goals and destinations.

Developing your individual or organisational potential by way of accredited training and assessment methods is bound to improve efficiency, productivity and confidence, which often result in increased performance levels and social harmony. To quote Eric Burns' wisdom:

Greatness is more than potential. It is the execution of that potential. Beyond the raw talent, you need the appropriate training. You need the discipline. You need the inspiration. You need the drive.





Dan Hill, Terry Hill and Lee Perlitz meticulously demonstrate the critical association between education, training development, organisational development, performance improvement and training techniques. In this useful book the authors pave the way on how to enhance and execute both individual and collective potential. They have dissected and demonstrated the facilitation, implementation and organisational planning processes in a practical but thoroughly reliable manner, to guide trainers towards higher levels of competence and professional recognition, to become effective, accredited training and assessment mentors.

Not only do the trainees and trainers have to harness the power of training techniques and behavioural science variables, but also the businesses, industries and the public sector, all of which are in need of such knowledge and techniques for the improvement of individual and organisational efficiency.

Dr Jay Alparslan

Jay Alparslan is a member of the executive boards of various international organisations and was also the first Head of Commonwealth and State Government Relations in Australia. Dr Alparslan has been the main initiator and architect of the now multi-billion dollar industry, 'Export of Australian Education Services'.

His diverse professional background includes his activities as Senior Australian Trade Commissioner, Senior Australian Diplomat/Envoy in Europe and the Middle East, Senior Adviser to the Deputy Prime Minister of Australia, Senior Adviser to the Australian Trade Minister, and Consultant to New South Wales Government Industry and Development Ministers. As a senior academic, Dr Alparslan was also Course Director, University of New South Wales Institute of Administration, running the postgraduate training program, 'Human Behaviour in the Workplace', for practising public and private sector executives.

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After a varied career ranging from service in the Royal Australian Air Force and consumer product sales, through to national and general management information technology-related positions in global organisations, Dan now runs a registered training organisation with his brother, Terry, in South East Queensland. His philosophy regarding learning has led to his attainment of a Graduate Certificate in Business, Diploma in Training and Assessment, Master of Business Administration, and PhD in the field of sociology. Dan is currently working as an instructional designer and training manager at SpecTraining Pty Ltd.



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Lee Perlitz

Lee Perlitz has over 20 years experience in corporate sales and marketing, working with such companies as British Airways, Telstra and the ANA Hotel Group. For the last 10 years she has been involved in both the corporate training and vocational education and training industries as a trainer as well as a manager. Most recently Lee was the founder and director of the Coomera College of Business and Industry Training (CCBIT)—the RTO (Registered Training Organisation) division of Coomera Anglican College on Queensland's Gold Coast. With this background Lee has a wealth of knowledge not only about what it takes to be a trainer but also what it takes to run an AQTF (Australian Quality Training Framework) compliant registered training organisation. Lee also has a number of textbook credits to her name specialising in business and tourism studies.

Preface

Training and assessment in Australia is a dynamic sector. Over the last decade, there have been many advances in the development of learning theories, particularly surrounding the ability of mature brains to adapt and learn new knowledge and skills. This has led to more research into what works best for young adults and older learners and what is best for the training of Australia's working population. Additionally, there are trials and reports from many training organisations and academics who are developing improved methods of delivery and assessment. The Australian Flexible Learning Framework recently published findings from ongoing studies on the effectiveness of e-assessment strategies, and found that despite the growth in e-learning and assessment toolboxes being offered through training organisations in Australia, there is still a lot of concern and suspicion surrounding the effective use of such tools.

While the environment for vocational education in Australia is dynamic, there remains an underlying need to develop high quality trainers and assessors to facilitate the strategies created by industry, academia and government. Even though most research conducted by the National Centre for Vocational Education and Research reports that the majority of trainers and assessors meet industry requirements, anecdotal evidence and feedback from many trainers, assessors and institutions (including the Australian Chamber of Commerce and Industry) suggests that many practitioners fall short of meeting the basic criteria; the standard and quality of training and assessment is inconsistent.

The pivotal issue involves striking a balance between content knowledge and professional practice. This achieves equilibrium in relation to the skills and knowledge of the industry that a trainer/assessor has, and their skills and knowledge as a professional Vocational Education and Training (VET) practitioner. Many organisations tackle this issue using innovative work schemes to ensure trainers develop their industry as well as their professional practice skills. Others use a training approach to develop the trainer's industry knowledge. An important outcome of these approaches is that where trainers and assessors accept responsibility for their own professional development, their ability to provide quality training and assessment for learners improves.

Dan Hill, Terry Hill, Lee Perlitz

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- Dr Jay Alparslan, for his kind contribution of the foreword
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- the RTOs who provided input into the creation of this text, in particular the Australian College of Training and Employment (ACTE) and the Australian Institute of Management QLD/NT (AIM) (special thanks also to the University of Southern Queensland).

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E-student

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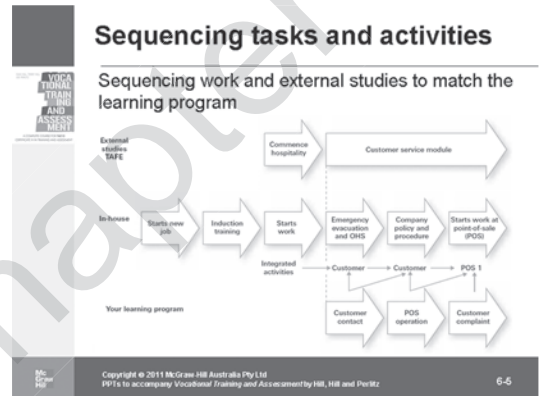
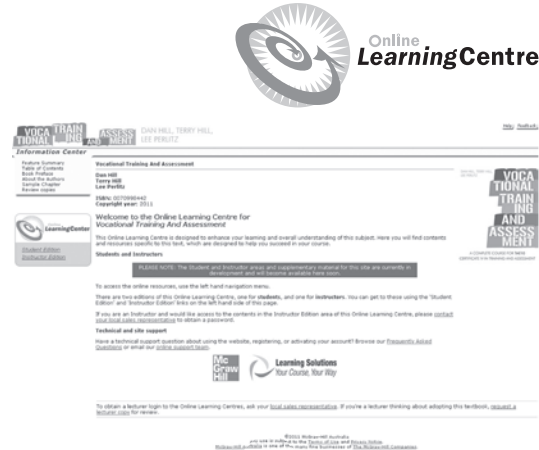
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EFG Health & Safety Executive
HAZARD IDENTIFICATION AND RISK TREATMENT FORM 1.1

HAZARD	RISK	Identified	RISK TREATMENT		Responsible Person
			(1-5)	Name/Date	
Problem	Location				

E-instructor

In addition to all student resources, instructors have additional password-protected access to:

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A series of sample answers to the questions from the book, which can be used as a marking guide.

Artwork library

Illustrations from the text are available in an online artwork library as digital image files. Instructors thus have the flexibility to use them in the format that best suits their needs.

Introduction

Taking a practical approach

The pragmatic approach taken in the recently released Training and Education training package—TAE10—has been met with relief by many practitioners who were concerned that the system of training trainers and assessors had become too involved with the practice of training at the expense of vital industry knowledge. The TAA04 Training and Assessment training package, released in 2004, was seen as a marked improvement from the 1998 workplace training package in that it dealt more thoroughly with the professional practise of trainers and assessors. However, some industries believed that it was distracting trainers from their core industry skills and leading to poorer quality training outcomes.

The alternative argument concerns the level of professionalism, consistency and reliability shown by ‘qualified’ trainers and assessors who undertake Certificate IV in Training and Assessment as a ‘means to an end’. The qualification has become the default benchmark for all nationally recognised vocational training and assessment. In order to train or assess a national qualification, whether a trade apprenticeship, hospitality course or business graduate diploma, Certificate IV is observed as the entry-level requirement. School teachers in all states and territories require a mandatory university degree. They train for years to develop the skills and knowledge to teach children in classrooms across the country. So two questions that spring to mind are:

- Is Certificate IV a relevant and sufficient qualification?
- How can we ensure trainers and assessors maintain a high standard?

TAE10 has taken a practical approach to the training of Australia’s newest vocational training and assessment practitioners. The Certificate IV qualification focuses on the development of both training skills and knowledge necessary across all industries and the skills to identify and develop quality assessments for any relevant vocation. It does not proclaim to be the ultimate qualification, but it is a necessary one. In fact, those undertaking Certificate IV—and chances are you are one of those people—will need to continually develop their training and assessment skills long after completing the qualification. This is ensured by the system of frameworks, standards and monitoring that sustain the industry in Australia.

A high standard can only be maintained if both those conducting training and assessment and those charged with regulating the industry work together to continually improve quality. This is done through a number of mechanisms—all of which are being improved to ensure instances of sub-standard quality are reduced. These mechanisms begin with the Australian Quality Training Framework (known within the industry as AQTF 2010). This framework spells out the necessary quality systems that training organisations must possess if they wish to register as a national training and assessment provider. The framework also provides the standards for ongoing registration for RTOs. Of course, the framework would be irrelevant without a system of regulation. State and federal training authorities and standards bodies monitor, audit and regulate the industry through systems of training, development, registration and education.

Certificate IV is the necessary and right starting point for trainers and assessors in Australia, and the ongoing quality of the practise of trainers, assessors and training organisations is monitored by regulators and the industry. But the most important element in the system is you—the trainer and assessor.

Learning to learn

As an adult you have been exposed to a variety of experiences that have helped you attain the knowledge and skills you currently possess. Some of these experiences have been formal, such as attending school or further education, and some have been informal, such as the communication and social skills acquired during the course of life. *Vocational Training and Assessment* has been designed to support formal learning and is laid out in a step-by-step format to take you through the various requirements of Certificate IV. There are ample opportunities provided to practise and assess your skills and knowledge along the way, supporting you and your training provider in meeting the necessary criteria. Importantly, a textbook gives you the opportunity to reflect on the information later, helping you develop your skills and knowledge further once you are working as a trainer and assessor.

To get the most out of your formal learning experience, you must identify how you learn best. As a feature of the text, you will learn how to aid your own students, and can use the same techniques to determine your own preferred learning style. Even at this point you should reflect on those instances where you have learned best and ask yourself why you were able to absorb or apply the information better in those circumstances. It might be because you were able to apply your new skills immediately, or because you had a chance to read through the information and study it thoroughly. Alternatively, it may have been due to your interaction with a good coach, trainer, teacher or colleague. As an adult learner, much of the responsibility for learning becomes our own. By determining how you learn best, you can improve the outcomes for yourself by discussing the options with your trainer, and coming to an agreement about the most suitable method for your circumstances.

What is required of you?

TAE10 requires the successful completion of 10 units of competency to attain Certificate IV in Training and Assessment. According to the packaging rules, seven of the units are core. This means they must be included in the course of completing the qualification. A further three are electives, simply meaning that the training organisation and you can decide which three other competencies are best suited to your training needs and that of your organisation, if applicable. The core units are:

- TAEDES401A Design and develop learning programs
- TAEDES402A Use training packages and accredited courses to meet client needs
- TAEDEL401A Plan, organise and deliver group-based learning
- TAEDEL402A Plan, organise and facilitate learning in the workplace
- TAEASS401A Plan assessment activities and processes
- TAEASS402A Assess competence
- TAEASS403A Participate in assessment validation

These units cover the fields of *design*, *delivery* and *assessment*. Each field builds on the knowledge gained from the preceding one. For example, as you learn about unpacking training packages, you can apply this knowledge to create effective training delivery and in turn more valid and effective assessments.

The information for elective units in this book covers:

- TAEASS502A Design and develop assessment tools
- BSBCMM401A Make a presentation
- TAELLN401A Address adult language, literacy and numeracy skills
- TAEDEL404A Mentor in the workplace
- TAETAS401A Maintain training and assessment information

These electives have been chosen as they broadly apply to most workplaces. The design and development of assessment tools is covered in Chapter 9 and can assist those wishing to further their studies to include the Diploma of Training and Education at a later stage. Making a presentation is an essential element for most face-to-face trainers. This skill is highly transferrable in business and can improve your delivery techniques and skills. Language, literacy and numeracy (LLN) underpin every learner's ability to learn. Your knowledge of understanding, identifying and allowing for the various LLN needs of your learners will improve your professionalism within the industry. Lastly, mentoring is an inextricable and profound training method that enhances the learning experience for both the mentor and the learner. Your ability to establish yourself as a mentor within your training career will be valued highly by those around you, not least your learners. Reporting procedures and records management are also very important factors in maintaining compliance with AQTF standards and conditions.

The benchmarks

There are two distinct goals underpinning this text. Firstly, to provide a simple yet thorough approach to the requirements of professional trainers in Australia. This is done by avoiding verbose language, while still acquainting you with the industry jargon that you are likely to be exposed to in the course of your career. Secondly, to highlight the requirements of AQTF by regularly referring to sections and standards within the framework that require your attention as a qualified trainer.

RTOs in Australia are bound by a number of regulations, but none are more important than AQTF for the continuance of their registration. As such, trainers must not only be aware of the standards, but proactively seek to foster them whenever they are undertaking the role of trainer and assessor for an RTO. References to AQTF throughout this text provide ample opportunity for you to identify and understand how these important standards apply to you.

Being learner-centred

Vocational Training and Assessment is a tool for you to use during your journey to become a qualified trainer and assessor in Australia. As such, the text has been designed to be used, not just read. If you've identified that you learn better through the application of your knowledge, then the activities and assessments provided in this book will help you grow and learn throughout the progression of your course. You are the learner in this case, but consider your future as a trainer and assessor in Australia and the benefit which having a learner-centred approach to your training now could have on your future students. The approach involves caring about the outcomes of your learners and creating the tools, environment and

results that will best suit their needs. While you visualise yourself as a professional trainer, imagine the respect and value you'll attract by being devoted to the quality outcomes of your learners. Your entry into the training and education industry is a new opportunity to position yourself as a high quality, focused and professional practitioner. Embrace the opportunity to become a role model trainer and assessor for those who can rely on you.

For the RTO

If you're using this text to support your TAE40110 learners, you'll need to know some of the tips and tricks to get the most out of the book and the assessments and online resources provided.

Firstly, the book is designed to cover the knowledge requirements of each of the core and elective units listed above using a linear pedagogical approach. You should encourage your learners to actively participate in the activities in each chapter to consolidate their knowledge and provide a source of formative evaluation to your trainers and assessors. The end-of-chapter mapping documents indicate how each activity and assessment aligns with the units of competency covered. However, it is strongly recommended that you develop your own assessments to suit the context of your training. Additional assessments and answer guides featuring sample answers to the questions in the book as a guide for instructors are located on the OLC website which accompanies this book, <www.mhhe.com/au/training> (see p. xv), and provide an excellent starting point or reference for your assessors and assessment designers.

Secondly, flexibility is built into the activities and assessments in this book to allow for application in a variety of contexts. Where reference to an organisation or workplace is required, a learner or assessment candidate may refer to one they are familiar with, or they may be provided a scenario by the assessor.

Finally, we are staunch believers in, and practitioners of, continuous improvement. We therefore encourage feedback and recommendations from you to assist in the ongoing improvement of online resources and future publications. Ideas, recommendations and suggestions may be emailed directly to the authors at: <feedback@spectraining.com.au>.

Thank you for choosing our book to help you and your learners become quality trainers and assessors.

Dan Hill, Terry Hill, Lee Perlitz

Part 1

LEARNING DESIGN

It could be argued that all phases of a learning program's development are equally as important—and this is true. It is during the design phase, however, that the building blocks for the entire program are chosen and its ultimate success depends upon these foundations.

During the design phase you will consider:

- the needs and expectations of the client and/or learner
- how to interpret and use training packages and accredited courses
- the ultimate outcome of the program
- occupational health and safety (OHS) issues relating to:
 - › learner needs
 - › learning content
 - › learning delivery requirements.

You may also need to ask the following questions:

- Why is the learning program necessary?
- Who is the program for?
- What is the best method of delivering the program?
- How will the learners' competence be assessed?
- What resources and facilities will be available?
- What is the timeframe in which the learning will be delivered/completed?
- What is the language, literacy and numeracy (LLN) level of the target audience?
- Will the learning program need to take LLN needs into consideration?

These and other similar questions must be considered and researched before the design process can begin. Answers to these questions will ensure you know the best and most appropriate methods of achieving the desired outcomes.

How successful the learning program is, or whether it has achieved its outcome or not, will depend on the work done in designing and developing the initial structure of the program.

Part 1 addresses the following units:

TAEDS401A—

Design and develop learning programs

TAEDS402A—

Use training packages and accredited courses to meet client needs

TAELLN401A—

Address adult language, literacy and numeracy skills

Chapter 1

TAEDES401A DESIGN AND DEVELOP LEARNING PROGRAMS

Element 1

Define the parameters of the learning program

The first thing to do when designing and developing a learning program is to determine who and what it is for. These two considerations define the parameters of the program—they provide guidance on the type and range of topics to be covered as well as how these should be covered and assessed. In this chapter we look at the issues that need to be considered when designing and developing a learning program.

Learning outcomes

Upon completion of this section you should be able to:

- 1.1 Clarify purpose and type of learning program with key stakeholders
- 1.2 Access and confirm the competency standards and other training specifications on which to base the learning program
- 1.3 Identify language, literacy and numeracy requirements of the program
- 1.4 Identify and consider characteristics of the target learner group

Note that in this chapter we will be referring to areas of formal, nationally recognised training packages, which are covered in detail in Chapter 2. It is necessary to briefly mention these areas here as they are inextricably linked with defining the parameters of a learning program. Full and detailed explanations follow in Chapter 2.

Who are the key stakeholders?

Irrespective of the type of organisation you work for, various **stakeholders** will be involved in any learning program you design and deliver. These stakeholders will, for the most part, be your clients (but will also include trainers, administration staff and industry experts).

A client is anyone who comes to you with a training need. Clients could be (but are not limited to):

- corporations, enterprises and business organisations or government departments or agencies (e.g. to put staff through Certificate or Diploma level courses, or shorter, skills-based training in order to improve staff productivity)
- individuals who may be undertaking a traineeship or apprenticeship
- groups of learners who are attending the same course (e.g. staff from a particular organisation or learners attending a college)
- internal clients from within your own organisation undertaking professional development training, induction training and so on
- candidates for assessment who have the necessary skills and are applying for recognition of prior learning (RPL) or recognition of current competency (RCC) in a specific, formal qualification. RPL and RCC are assessment methods used for people who already have the skills required by a formal qualification, to acquire that qualification without having to do the actual course. These assessment methods take into consideration a person's experience in the workplace, as well as any other qualifications they may have, and compare them to the requirements of the qualification sought. If successful, the person is granted the qualification.

No learning program can be successfully designed without the input and cooperation of a variety of stakeholders. Their ideas and suggestions must be sought to ensure that all aspects of competence are considered and that a well-rounded outcome is achieved.

Looking at your own organisation, describe the stakeholders that you would need to involve in the design and development of a learning program. If you are currently not working, use a previous workplace or discuss these requirements with friends or family who are in the workforce.

Activity 1.1



Determining the purpose of a learning program

When developing a learning program, it is important to determine its intended purpose. Questions need to be asked about why the program is being run. This will substantially influence the delivery and assessment methods to be used. The purpose of the program may determine:

- what topics need to be included
- how the learning will be delivered

- what assessment methods will be used
- the range and depth of knowledge to be imparted.

Organisations and individuals will require learning programs for a variety of reasons. These reasons could include (but are not limited to):

- doing an apprenticeship or traineeship—this involves on-the-job training over an extended period of time with a trainer visiting the learner at regular intervals to provide the ‘formal’ training in accordance with the approved units of competency (The Australian Vocational Education and Training [VET] system and units of competency are covered in depth in Chapter 2.)
- refreshing or updating current skills to ensure that staff continue to work to the desired standards; this may be a simple matter of highlighting information or reminding learners of policies, procedures or product and service facts
- learning a new skill or procedure—to improve employability skills or to enable staff to meet the required work standards; this may involve providing in-depth and/or complex information
- professional development (PD) training—as part of the organisation’s ongoing staff development and/or to comply with government legislation dealing with staff competency standards
- developing vocational competency—for people who wish to pursue a nationally recognised qualification
- developing language, literacy and numeracy skills (LLN)—to assist staff who may have difficulties for a variety of reasons
- meeting legislation, licensing or registration requirements, such as occupational health and safety (OHS) requirements
- taking corrective action—where staff are not performing to the required standards and additional training is necessary.

Once you have determined who your client is, as well as the purpose for the learning program, you will need to determine the exact learning requirements with the relevant stakeholders. The stakeholders involved in these discussions could include:

- the person to be trained—so that you can get an idea of their:
 - › current competency level
 - › learning style, to structure the learning program to their benefit
 - › general attitude towards work and training
 - › future aspirations
- the learner’s supervisor—so that you can:
 - › get their opinion of the learner’s current competency (remember—what a person thinks they can do and what they can actually do may not necessarily be the same thing and it is important to get an outside opinion)

- › get specific information about how things should be done in their department and the standards to which they expect work to be carried out
- the organisation's management—so that you can:
 - › get a picture of where the training will fit in with the organisation's overall staff policies
 - › learn about company standards, policies and procedures that may need to be included in the training
 - › determine the parameters of the training requirements. This could include discussions about:
 - » timeframes for training
 - » location of training
 - » costs and other resources required
 - » scale of the training—will it encompass an entire qualification, or only a few units from a qualification and so on? (This is discussed in Chapter 2.)
- the organisation's training manager (if applicable) to discuss the learner's past history and training strategy for the future.

Issues to be discussed at this stage could include (but are not limited to):

- Why does the client need your help?
- What are their requirements and priorities?
- Are there any constraints, such as budgets, timeframes and locations?
- Are there any other stakeholders and, if so, who are they?
- Who is the target group for the learning program?
- What skills and knowledge need to be developed?
- Where are the learners located?
- Will the training take place:
 - › on the job during working hours?
 - › at a location away from the workplace?
- Will you need to be aware of:
 - › national standards, codes of practice, and Commonwealth and state/territory legislation, including licensing requirements, industrial relations requirements and OHS obligations?
 - › business or industry knowledge specific to the training needs?
 - › training packages and their competency standards (see Chapter 2)?

Other issues to consider when developing a learning program for a client are outlined below.

Legal requirements

- *Licensing issues*—where there are laws governing business practices in specific industries. For example, any establishment serving alcohol must meet very strict guidelines in

how and to whom they serve alcoholic beverages. Equally, the sale of tobacco products is also heavily regulated. These legal requirements must be taken into consideration when training staff in these industries.

- *Duty of care*—all business establishments are responsible for the health and safety of staff and customers on their premises. Safety precautions must be in place and learning programs, again, need to consider these issues.
- *Anti-discrimination and equal opportunity laws*—these must be observed in all dealings with a client.

Industry requirements

- *National codes of practice*—these are often developed by industry councils and represent codes that organisations within that industry must adhere to. For example, the Master Builders Association has strict guidelines on how their members should conduct business, both in the carrying out of their work and their customer service standards. Adherence to these codes means that a builder can show membership of a nationally recognised association and a ‘guarantee’ of quality. The association also provides dissatisfied customers with an avenue for redress should this become necessary.

Organisational requirements

- Organisations also have their own internal policies and procedures in relation to, for example, manufacturing their products, delivering service to customers, or in administration procedures. Such policies and procedures should be incorporated into learning programs where appropriate.

Product specifications

- When training is to be given on specific products or services, it is important for the trainer to have an in-depth understanding of that product or service. It may be necessary to involve supervisors or product/service specialists in the learning program to ensure that the information is delivered correctly.

Once you have addressed these issues, you will have a clear idea of what your client is looking for. This will help you to determine the most appropriate training package for your client, as well as how to apply it.

Expected outcome

When developing a learning program it must be very clear, from the start, what outcome is expected from the learning, as well as how the outcome will be measured. You will need to ask the following questions:

- What must learners, as a minimum, be able to do as a result of the training?
- How will learners be assessed as to whether they can now perform the new task to the required standards?
- How will you ensure that the outcome is achieved?

- Will the learning program incorporate an entire qualification (i.e. result in a Certificate or Diploma) or will the program use only one or two subjects that fulfil the specific purpose of the training?
- How will the learning impact on the organisation's productivity?
- How will the learning impact on the learner's career path within the company/ industry?

It is important to remember that the goal of the learning program is to achieve the expected outcome, so every step taken within a learning program should bring the learner closer to this.

In conjunction with relevant stakeholders from your organisation, discuss any current training needs the organisation may have.

- What would be the purpose of the learning program?
- What issues would need to be considered when designing the program?

Activity 1.2



Confirming competency standards

Having established the key issues of the learning program in conjunction with the stakeholders, the standards of competence then need to be determined. **Competency** refers to the standard to which a task must be completed—each and every time—in order to fulfil organisational or legislative requirements and to ensure a consistently high quality of service.

In the Australian Vocational Education and Training (VET) system, training is *competency* based. This means that training places an emphasis on what a person *is able to do* in the workplace, rather than *what they know*, as a result of completing a learning program. Competence is assessed on the basis of a person's ability to put into practice the skills and knowledge they need to perform their tasks effectively and efficiently.

In brief, as this subject is dealt with in detail in Chapter 2, the Australian VET system offers nationally recognised qualifications through the use of formal training packages, each of which is made up of a number of different qualifications (Certificate courses). These, in turn, contain a number of units of competency. Each unit of competency has **elements** and **performance criteria** (or topics), as well as a range of **required skills and knowledge** that must be included in the learning program. Learners must demonstrate competence in all of these to gain their qualification.

So, confirming competency standards can mean any of the following:

- determining the competence required for each *unit of competency* proposed for a learning program, under the VET system, looking at all the *elements* and *performance criteria*, the *required skills* and *knowledge*, and making a judgment on whether these address the client's specific needs (see Chapter 2)

- looking at the organisation's own internal or legislative standards or requirements—this might involve discussing the policies, procedures, product or service specifications to determine how the learning program will be structured around them
- using a combination of both of these—an organisation may choose to offer staff the opportunity to take part in training that will lead to a formal qualification, but it may want to include content that addresses its own particular needs, policies, procedures and processes.

Examples of how this can be done are given in Element 4, 'Breaking down the learning content' (p. 23).

The competency standards agreed upon will form the basis of the learning program, and achievement of competency in the agreed standards will provide the learning program outcome.

Identify language, literacy and numeracy requirements

In the design phase, when assessing competency standards, issues such as language, literacy and numeracy (LLN) also need to be considered. Allowances should be made, where possible, for a flexible learning environment. Some job roles require specific language, literacy or numeracy skills. For example:

- an accountant must be good with numbers, so numeracy skills are important
- a salesperson must be a good communicator, so language skills are needed
- teachers must be able to research and disseminate information, so they must have good language and literacy skills.

When topics to be covered in a learning program require a specific level of language, literacy or numeracy, some learners may be at a disadvantage. Once you have determined what is required by all sections of the competency standard, you will need to determine what levels of language, literacy and numeracy will be needed by the participants. This is dealt with in detail in Chapter 3.

Accessing competency standards

Depending on whether the learning program is based upon a formal training package leading to a nationally recognised qualification and is competency based, or is based upon internal organisational requirements, competency standards can be accessed in a number of ways. For example:

- VET competency standards can, primarily, be found on the Commonwealth government's Training.gov.au website <<http://training.gov.au>> or in the printed versions of the relevant training package. These will detail how a qualification is packaged, the units of competency that must be included and the benchmarks or standards attached to each unit.

- Organisational standards and specifications are a part of an organisation's quality management system and can generally be found in organisational **policy** and **procedure** manuals. These will outline the standards to which:
 - › all work tasks must be performed
 - › all products must be manufactured
 - › service must be delivered
 - › equipment and machinery must be used
 each and every time. These standards are the organisation's guarantee of a consistent and high quality of service or product delivery.
- Industry codes of practice are policies, procedures and, possibly, legislative requirements set by governing industry bodies or associations, such as the:
 - › Real Estate Institute (of your state)
 - › Master Builders Association
 - › Retail Traders Association
 - › Australian Federation of Travel Agents.

These associations and governing bodies are responsible for setting the standards for their industry as a whole and will often have very strict **guidelines** on how an organisation, within their industry, must perform.

Using the industry you are in as your basis, research the organisational policies and industry codes of practice that apply to that industry. Discuss:

- How could these policies, procedures and legislative requirements be used in a learning program?
- Choose two policies from within your organisation and briefly list the competencies you believe staff must demonstrate in order to comply with these policies.

Activity 1.3



Characteristics of the target learner group

Before you can identify and analyse the learning needs of your clients, you need to have a clear understanding of your target learner group. You may know what topics must be covered in the learning program, but who are the people who will benefit from these new skills and competencies? By finding out more about your target learner group, you will be able to design a learning program that meets their needs as well as that of the client and the organisation. Figures 1.1 to 1.3 overleaf show different types of workplace and learning groups.

You need to find out what similarities there might be between the groups of people who will be participating in the learning program, as well as what their current skill level is. The choice of training package, venue, style of training and so on will depend on this. For example, is the target learner group:

- people who are already in the workforce—who might have constraints on their time?



Figure 1.1

- school graduates—who may have a limited knowledge of the business world?
 - special target groups—who have very specific training needs?
 - people who are already experienced in certain fields of business and who may only need a refresher course?
 - apprentices or trainees whose learning program may be delivered on the job over a period of years?
 - individuals learning new skills and knowledge or who wish to upgrade skills and knowledge?
 - individuals who wish to change their career path or prospects?
 - unemployed people who wish to improve their employability skills?
 - individuals on specialised learning programs, such as people with disabilities or Indigenous Australians?
- learners from other countries who wish to study in the Australian VET system?
 - individuals or groups needing to meet licensing or other regulatory requirements?

Target learner characteristics can also include (but are not limited to):

- their level and previous experiences of formal education
- their current skill or competency levels
- the level and breadth of their current and past work experience
- their cultural background and any related needs

Figure 1.2



Figure 1.3



- special needs—physical or psychological
- their reasons and motivations for participating in the learning program
- the language, literacy and numeracy abilities of learners
- their learning style and preferences.

These are all important factors in the design of a learning program.

Using the work you did in Activities 1.1–1.3 as a basis, consider the characteristics of the learner group from your own organisation.

- Are there any special issues you would need to consider?
- How would you design your proposed program around your learner group?

Activity 1.4



You can find out about the target learner group in a variety of ways. You may receive information from employers, company files or discussions with supervisors or the individuals themselves. Observation of individuals in the workplace is another method of gathering an overview of the learner's current capabilities. You may gain a more accurate picture of the learners by speaking to them directly, rather than to a manager who is often removed from their daily operations. The objective here is to find out if there are any learners who have specific needs that must be incorporated into the learning program design.

Analysing learners' current capabilities means that you need to understand their characteristics and then determine whether the information you have gained will affect the way you design your learning program.

To summarise, when designing a learning program—whether it is based on VET competencies or organisational standards—it is important to:

- clarify the purpose of the program with relevant stakeholders
- access and confirm the competency standards to be met
- identify the characteristics of the group to be trained.

If this phase of the learning program development is carried out sensitively and diligently, then the delivery, assessment and ultimate outcomes of the program will rest on solid foundations.

Element 2

Work within the Vocational Education and Training (VET) policy framework

In Australia we are able to offer qualifications that are nationally recognised. We can do this because the Commonwealth Department of Education, Employment and Workplace Relations (DEEWR) has developed and implemented a Vocational Education and Training (VET) system that is comprised of standards, conditions and performance

criteria that apply across the board to all training organisations and qualification courses around Australia.

These standards, conditions and performance criteria have been researched, analysed and validated not only by DEEWR but also by the relevant industry partners. This means that VET offers up-to-date, real-world training opportunities. In this section, we look at the various departments, governing bodies, policies and frameworks that have shaped the Australian training environment.

Learning outcomes

Upon completion of this section you should be able to:

- 2.1 Access relevant VET policies and frameworks, and apply to work practices
- 2.2 Identify changes to training packages and accredited courses and apply these to program development
- 2.3 Conduct work according to organisational quality assurance policies and procedures

An overview of VET in Australia

Nationally recognised training in Australia is governed by, and subject to, very strict standards and conditions, and all **registered training organisations (RTOs)** and trainers working under an RTO are required to comply with these standards and conditions. We will spend some time, now, looking at how the education system in Australia is governed, and the policies and frameworks that provide its structure.

In essence, VET policies can include:

- policies and procedures set by a national organisation, such as the National Skills Standards Council (NSSC)
- the standards and conditions set by the **Australian Quality Training Framework (AQTF) 2010**
- other relevant policies, such as industry- and/or organisation-related policies and procedures.

Policies and procedures set by national organisations

The most important policies and frameworks are those set by the **Australian Qualifications Framework (AQF)**, the NSSC and the AQTF under the banner of DEEWR. It is the standards, set out in these documents, against which a training organisation and/or trainer in the VET system will be audited and deemed competent to provide formal training.

The policies, frameworks and governing bodies under the VET system are highlighted in Table 1.1 opposite.

Table 1.1	Policies, frameworks and governing bodies of the VET system
DEEWR	<p>Training in Australia is controlled, largely, by the Department of Education, Employment and Workplace Relations. DEEWR is the main government department that provides national leadership in the education and workplace training sector. DEEWR works in collaboration with each state and territory to ensure a national focus on training and assessment. All policies and frameworks for education and training in Australia are developed and implemented under the DEEWR banner.</p> <p>Website: <www.deewr.gov.au></p>
AQF	<p>The Australian Qualifications Framework is a national, quality assurance framework under DEEWR that provides structure for qualifications in schools, VET and higher education. The AQF determines the type of qualifications available to Australian learners and develops training packages together with Industry Skills Councils (ISCs). In brief, a <i>training package</i> offers a series of different qualifications (Certificates and Diplomas) in a given industry. Each qualification is made up of a number of units of competency (or subjects) and each of the units of competency is made up of a series of elements and performance criteria that the learner must pass competently to achieve the whole qualification. The AQF:</p> <ul style="list-style-type: none"> • sets out the level of qualification available at each stage of education • determines the competencies required to gain a qualification • sets out the performance criteria, skills and knowledge, and assessment criteria of each unit of competency. <p>When designing a learning program, it is important to access the information on each specific course or unit of competency being considered and to read its rules (see Chapter 2).</p> <p>The AQF is a key policy instrument in ensuring quality education and training that is nationally recognised.</p> <p>Website: <www.aqf.edu.au></p>
ISCs	<p>Industry Skills Councils play a vital role in the identification of the skilling needs within their specific industries. It is important that ISCs are in touch with all aspects of their industry so that they are able to determine what training is needed, and how learning programs should be structured. Together with AQF, these training needs are then translated into the training packages used by training organisations around Australia.</p> <p>Website: <www.isc.org.au></p> <p>For a list of ISCs see: <www.dest.gov.au/sectors/training_skills/policy_issues_reviews/key_issues/nts/lnk/advisory.htm></p>
NSSC	<p>The National Skills Standards Council is a committee of the Standing Council for Tertiary Education, Skills and Employment (SCOTESE), which is one of a number of Standing Councils that report to the Council of Australian Governments (COAG). SCOTESE is the successor of the Ministerial Council for Tertiary Education and Employment (MCTEE).</p> <p>The National Skills Standards Council was established from 1 July 2011, signifying the implementation of a decision made by COAG in December 2009.</p> <p>The National Skills Standards Council provides advice to SCOTESE on national standards for regulation of vocational education and training. This role was previously undertaken, amongst other things, by the National Quality Council (NQC), which was dissolved by the MCTEE in late June 2011.</p> <p>Website: <www.nssc.tvetaustralia.com.au></p>

continued

<p>AQTF</p>	<p>The Australian Quality Training Framework provides standards and conditions for the operation of a registered training organisation (RTO). These standards and conditions are outlined briefly below.</p> <p>Standards:</p> <ol style="list-style-type: none"> 1. The RTO provides quality training and assessment across all of its operations 2. The RTO adheres to principles of access and equity and maximises outcomes for its clients 3. Management systems are responsive to the needs of clients, staff and stakeholders, and the environment in which the RTO operates <p>Conditions (deal with):</p> <ol style="list-style-type: none"> 1. Governance 2. Interaction with the registering body 3. Compliance and legislation 4. Insurance issues 5. Financial management 6. Certification and issuing of qualifications and statements of attainment 7. Recognition of qualifications issued by other RTOs 8. Accuracy and integrity of marketing 9. Transition to training packages/expiry of accredited courses <p>Each of these standards and conditions encompasses a number of performance criteria.</p> <p>Only RTOs are permitted to deliver nationally recognised qualifications in the VET system. All RTOs are audited on compliance with these standards and conditions on a regular basis to ensure quality training. To view the essential standards for RTO under AQTF 2010 go to website: <www.training.com.au></p>
<p>TGA</p>	<p>Training.gov.au is an online information system that stores all information regarding VET qualifications (see Fig. 1.4). It holds detailed information on all RTOs, training packages, accredited courses, qualifications and units of competency—each of which can be searched for using the appropriate course or unit codes.</p> <p>This is an excellent source of information when determining which units to include in a client’s learning program as it outlines the exact elements, performance criteria, essential skills and knowledge, as well as assessment guidelines for each given unit.</p> <p>Website: <http://training.gov.au></p>
<p>NCVER</p>	<p>The National Centre for Vocational Education Research is a Commonwealth- and state-run government organisation responsible for training research. It is unique in Australia’s education system. It is responsible for collecting, managing, analysing, evaluating and communicating research and statistics about vocational education and training.</p> <p>Website: <www.ncver.edu.au></p>
<p>RTO</p>	<p>A registered training organisation is an organisation that has satisfied the standards and conditions set by the AQTF. RTOs will have at least one training package on their ‘scope’. They may apply for extension to their scope at any time, provided they can show they have qualified teachers and training and assessment methods to deliver training in that scope. RTOs can be:</p> <ul style="list-style-type: none"> • a private RTO • a Technical and Further Education organisation (TAFE) • an organisation working in partnership with an RTO to provide recognised training and assessment services • an organisation that provides non-recognised training and assessment services.

STA/NVR

State Training Authorities (STA) are responsible for regulating the implementation of the AQTF within RTOs. They provide education and auditing services for RTOs in all areas of VET accreditation and registration. In July 2011, most states are referring this regulatory function to the National VET Regulator (NVR) with the exception of Victoria and Western Australia, who will continue to regulate VET providers who do not cater for international students and who operate solely within the state boundaries.

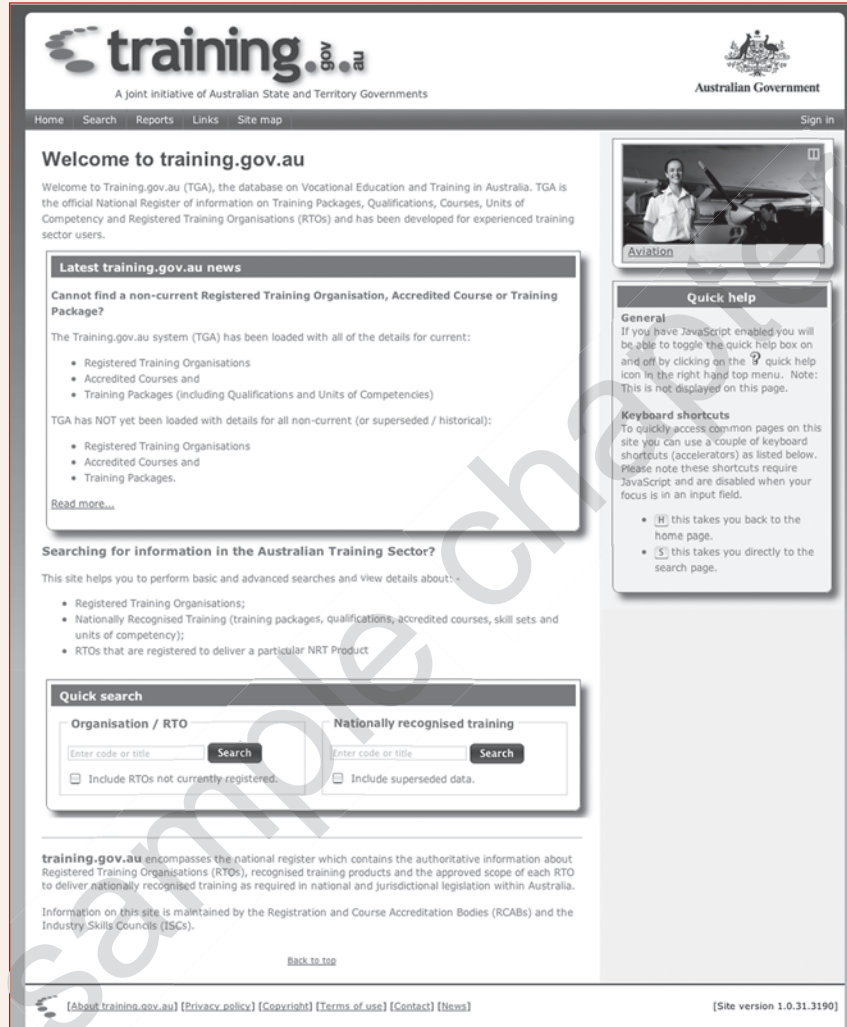
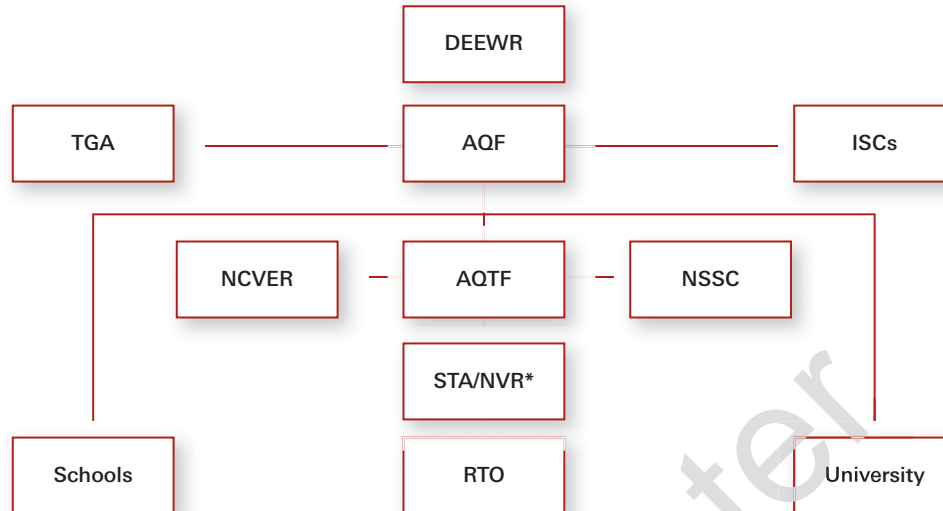


Figure 1.4 Training.gov.au home page showing industry news and the quick search function for finding specific units of competency and other training package information

Source line to be confirmed by Aust Gov. – Training.gov.au <www.training.gov.au>, accessed 29 October 2011, (c) Commonwealth of Australia, reproduced with permission.

Figure 1.5 below shows an overview of the education system in Australia.



* from July 2011, STAs in most states are referring power to the new NVR. The regulators role, among others, is to regulate the application of the AQTF within RTOs. For more information, go to the DEEWR website: <www.deewr.gov.au>

Figure 1.5 Overview of education system in Australia

Activity 1.5



1. Go to the TGA website at <<http://training.gov.au>> and read the following units to familiarise yourself with the format and contents of a unit of competency:
 - *BSBCUS301A Deliver and monitor a service to customers*
 - *BSBSLS403A Present a sales solution*

Note: When conducting a search—type in the unit code in the search box and ensure that ‘unit of competency’ is ticked before you commence the search.
2. Go to the AQF website at <www.aqf.edu.au> and familiarise yourself with the information to be found there.
 - View the *AQF Handbook* and find information available on Certificate II and Certificate IV level courses.
 - What are the main differences in the breadth, depth and complexity of knowledge and skills between these two qualifications?
3. Go to the AQTF website at <www.training.com.au> and look up Standard 1.4 in their Essential Standards for Registration.
 - What personal development do you undertake to stay current in your industry?

Changes to training packages and accredited courses

In order to maintain current standards and proactively incorporate information on future trends, training packages and accredited courses are reviewed at regular intervals (usually no longer than every five years). At these times, the AQF, along with the relevant ISCs, look closely at the qualifications offered, their packaging rules and units of competency, and make adjustments as required.

So a trainer must maintain a sound and up-to-date knowledge of their specific industry and area of expertise, as well as a current awareness of the training packages upon which their learning programs are based. Up-to-date information can be found by regularly viewing the ISC websites.

1. Go to the ISC website for Innovation and Business Skills Australia (an industry skills council) at <www.ibsa.org.au>. Click on 'News & Projects' and spend some time researching information on training packages being reviewed and developed.
2. Find and research the ISC website relevant to your own specific industry to see what (if any) changes are being made to training in that industry.

Activity 1.6



Organisational policies and procedures

As you are aware, an RTO and its trainers must maintain compliance with AQTF standards and conditions in order to retain their registration and right to deliver training. In addition to these standards, however, individual organisations have their own policies and procedures that will be part of their quality management system (QMS). These policies and procedures will offer guidance to staff on how certain aspects of the organisation operate and the standards to which they must perform their specific tasks.

Internal quality management issues may include (but are not limited to):

- ensuring staff qualifications are up to date
- keeping accurate records
- providing a consistently high standard of customer service
- providing a consistently high standard of manufacture
- developing and implementing product or service delivery procedures
- ensuring that advertising and promotional materials accurately reflect the product or service being offered
- procedures for:
 - › handling cash
 - › use and maintenance of computers and other office equipment
 - › dealing with complaints
 - › record keeping and information management systems.

When developing a learning program, an organisation's policies and procedures must be taken into consideration.

The education system in Australia is heavily regulated and is subject to strict standards and conditions laid out by DEEWR. This approach offers consistency across all states and territories of Australia and is the reason why we can truly say that VET offers nationally recognised training. This system also offers assurance to learners that they are dealing with reputable training organisations that have met and maintain the high standards of performance set by the AQTF.

Element 3

Develop program content

Now that you have a basic understanding of the learning program requirements, the target learner group, the required competencies, desired outcomes and the environment in which you will operate, you need to use this information to draw conclusions and determine the actual contents of the program. This means researching and determining the exact topics to be included, putting these into a logical sequence, finding the learning resources to be used in the program and determining how the learner's competence will be assessed.

Learning outcomes

Upon completion of this section you should be able to:

- 3.1 Research, develop and document specific subject matter content according to agreed design options
- 3.2 Evaluate existing learning resources for content relevance and quality
- 3.3 Specify assessment requirements for the learning program

Specific subject matter content

Understanding the basic outline of a learning program and the desired outcomes is only part of the design process. With the parameters of the program in place and agreed upon, the details of what needs to be covered must be fleshed out—what does the learner actually need to know to achieve competence in their role? For example, your client, OceanWorld, a marine theme park, has received several complaints about its customer service levels and management have decided to put all guest relations staff through a customer service skills course. You look at the position description of the guest services staff and determine what skills and knowledge they should, ideally, have to fulfil that role and then decide upon your subject content, as follows:

Role	Guest Relations Officer
Required skills and knowledge	<p>Must be able to:</p> <ul style="list-style-type: none">• communicate effectively with customers• deal with complaints• promote OceanWorld products and services• deal with people from diverse backgrounds• deal with inquiries—face to face and on the telephone

With the skills and knowledge requirements of the role established, the program content can then be developed as follows:

Subject matter content	<ul style="list-style-type: none"> • Effective listening and questioning skills • Interpreting non-verbal communication • Steps in complaint and conflict resolution • Selling and promoting products and services • Delivering and monitoring a service to customers
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Once you have chosen the program content, you will need to put it into a logical sequence. For example, there is no point in teaching learners about dealing with conflict before you have covered effective communication skills.

You will also need to conduct research on where you can find accurate and up-to-date information on these topics. In the case of a formal unit of competency (sourced from TGA) this has already been established through the unit's elements and performance criteria (see Chapter 2).

Existing learning resources

Learning resources form the backbone of a learning program. They provide written information on the topics being delivered and can form a lasting library of knowledge for course participants.

Learning resources can be:

- simple handouts—such as fact sheets, PowerPoint slide sheets, forms and document templates
- manuals—such as staff handbooks, OHS and/or other policy and procedure documents
- product brochures
- work books that learners can use to make notes and complete tasks and activities
- textbooks produced by publishers that provide full details on a given subject, such as this book.

Learning resources can be developed in-house to your own or the client's specifications. However, this can be very time consuming as you must ensure that you cover all competency requirements. It can, therefore, be beneficial to use existing resources. There are almost limitless sources of information for VET training resources. Some of these include:

TGA	Printouts of units of competency will provide very detailed information. We will look closely at these units of competency and their make-up in Chapter 2 (Element 3) starting on page 50.
Textbook publishers	<ul style="list-style-type: none"> • McGraw-Hill Education Australia • Pearson Australia
State study authority	<p>State education authorities offer some excellent tools that can be used for training and assessment purposes.</p> <p>For example:</p> <ul style="list-style-type: none"> • <www.qsa.qld.edu.au/10-12/10583.html> • <www.resourcegenerator.gov.au> • <www.qsa.qld.edu.au/10-12/1416.html>

continued

ISCs

Industry Skills Councils' websites will also offer resource materials that can be used for training and assessments.

For example:

- Innovation & Business Skills Australia – <www.ibsa.org.au>

Instructional design

Sometimes existing resources are not available or do not exactly match the requirements of the learning program. In these cases, it may be necessary to develop your own materials.

When developing training resources in-house, a number of principles need to be observed. In essence, instructional design is the process by which training instructions are improved through the analysis of specific learning needs of the participants and the systematic development of materials that address those needs. Instructional design includes the following:

- Studying instructional theories and tools to develop individual methods and resources for facilitating learning. This may mean looking at the different ways in which people learn. Some people learn by:
 - › watching a demonstration of the task
 - › listening to instructions
 - › actually doing the task.

The design of the learning program needs to take these learning styles into consideration so that all learners have an equal opportunity to participate as fully and successfully as possible.

- Relying on current research in educational psychology, educational theory and systems analysis to ensure that the most suitable and up-to-date facilitation methods and resources are being used.
- Basing decisions on proven instructional design methods.
- Developing a deep knowledge of various strategies and technologies that can be applied to course design.
- Working with experts on the subject matter to plan the structure of the program or materials in order to achieve the desired outcomes. These are often people in specific industries who have in-depth knowledge and expertise and who can be called upon for advice and input into the program.
- Integrating feedback, support mechanisms and opportunities to evaluate the materials being produced.
- Monitoring, reviewing and continually improving the materials.

These principles apply to the development of course materials and, if considered in conjunction with the principles of adult learning (covered in Part 2: Training Delivery), to the design and development of the program structure itself. Using only the latest research, and having the support of expert advice and assistance on a given subject, should ensure that you are able to produce learning materials that suit the client's and learner's needs exactly.



- Research sources of training materials for your specific area of expertise. Provide a list of these sources for your trainer.
- Start a portfolio of useful information for your future reference and include this list in your portfolio.
- Using the principles of instructional design outlined above, develop student study materials for a short training course on a subject of your choice.

Assessment considerations

Assessment considerations are dealt with in detail in Part 3: Assessment. However, as these are a component in the overall design of a learning program, they are briefly covered here.

The final thing to consider when designing a learning program is how the learners will be assessed against the program's competencies and desired outcomes. Methods of assessment can include any of the following:

- role play—where a fictitious situation is created for learners to act out the required skills and knowledge
- scenario—where, again, a situation is created and learners must explain how they would handle that situation
- project/case study—where learners are required to research a subject, answer questions, produce reports and draw conclusions
- observation—where the learner is observed, on the job, carrying out specific duties in line with the competencies of the learning program
- third-party report—where supervisors or mentors, on the job, prepare a report on the learner's activities and competencies in given tasks
- portfolio—a collection of important and useful information that learners can use on the job for their entire working lives
- vocational placement scheme (VPS)—this is similar to 'work experience' but learners are assessed on the job, whereas with work experience they are not
- written examination questions.

The assessment methods you use will depend on the type of training delivered, as well as where it is delivered. This is outlined below.

Workplace. In this situation, there may be time and space constraints. Any assessments undertaken in the workplace must be done with the supervisor's permission as the learner may need to be away from their normal work area for a period of time. Appropriate methods of assessment in the workplace could include:

- demonstration of skills and knowledge where the learner will perform specific tasks
- observation checklists where the trainer/assessor watches the learner during the course of their day, checking off competencies as they are demonstrated
- oral questioning—where the trainer/assessor asks specific questions relating to given tasks.

Classroom. In this situation, a group of learners participates in a theory and simulated-activity program. Appropriate methods of assessment here could include:

- role playing simulated situations so that competencies in such things as communication skills can be assessed
- projects and case studies, where learners are required to research information and draw conclusions
- scenarios, where learners are presented with a situation and asked how they would deal with this situation
- written examination questions that test a learner's knowledge on a given subject.

Distance. In this situation, learners do not have face-to-face contact with their trainer. Appropriate methods of assessment may include:

- projects and case studies
- scenarios
- written examination questions.

With the technological advancements we enjoy today, role plays and face-to-face lessons are more of a possibility than ever before. Technology such as Skype allows teachers and learners to demonstrate competency regardless of the distance between them.

Activity 1.8



Look at the following three scenarios of program delivery and describe what method of assessment you would use in each case.

Scenario	Method of assessment	Reason for your choice
1. On-the-job training on an OHS subject to a carpenter		
2. On-the-job training on use of office equipment to an office administrator		
3. Classroom training on customer service skills to a group of fifteen learners		

Element 4

Design the structure of the learning program

The last step in the design process is bringing the entire package you have created into a structured framework. This means developing a **training and assessment strategy (TAS)** that outlines (among other things) the target audience, the purpose of the learning program, how it will be delivered, how competency will be assessed, the qualifications of the trainer delivering the program and the stakeholders involved in the development of the program.

Learning outcomes

Upon completion of this section you should be able to:

- 4.1 Break the learning content into manageable segments and document the timeframe for each segment
- 4.2 Determine and confirm delivery strategies and required assessment methods and tools
- 4.3 Document complete learning program in line with organisational requirements
- 4.4 Review complete program with key stakeholders and adjust as required
- 4.5 Ensure a safe learning progression by analysing risks in the learning environment and applying a risk control plan

Breaking down the learning content

The content of a learning program can often be very complex—too complex to deliver comfortably as a single subject. Large, complex subjects need to be broken down so that learners are not confused by too much information. Learning should, ideally, take place in a step-by-step sequence so that the learning process can build up gradually—like bricks in a wall, one row at a time until the wall is complete.

In the case of a formal unit of competency, this has already been done, but in the case of a competency based on organisational requirements, you will need to break the individual tasks and subjects down into manageable components.

Example 1.1 Training package unit of competency

In this example, we will use a unit of competency from a formal training package: *BSBSLS403A Present a sales solution*. Although this unit has three elements, for the purpose of this example we will examine only the first one.

Element 1 states that the learner ‘must be able to prepare for a presentation’, so this will form the first topic to be covered in the program. This element, however, has been broken down into six performance criteria (shown below), each of which will need to be covered in the program.

Element	Performance criteria
1. Prepare for presentation	1.1 Obtain and organise products for use within a sales presentation
	1.2 Review product information to ensure familiarity with products
	1.3 Identify sales tactic options, and assess and choose them in terms of their ability to meet the needs and preferences of the prospect
	1.4 Consider a variety of sales solutions and prepare to meet buyer needs
	1.5 Identify and select sales aids
	1.6 Identify alternatives for prospects and assess them in relation to anticipated buyer needs

Activity 1.9



1. Look at the above performance criteria. Think about and outline how you might develop a training session around them.
2. Where would you find resources to assist you in the delivery of this session? Research likely sources and make a list of them.

Example 1.2 Competency based on organisational requirements

In this example, we examine the role of an office administrator who is required to perform tasks to organisational standards. The employee must be able to use the office information management system effectively. This, as a topic, can mean anything and does not give any clues as to what that topic might include. So, research will first need to be done on the organisation's policies and procedures with regards to using the system. Subsequently, the criteria for a learning program involving the correct use of the information management system could be broken down as follows:

1. Correctly access the computer filing system
2. Maintain security and confidentiality of log in and passwords as well as the information accessed
3. Opening and closing files and documents correctly
4. Creating folders and documents in line with organisational policies and procedures.
This might include:
 - a. using version control
 - b. including file and pathway in the footer of the document
 - c. saving the document in a manner set out in organisational procedures
 - d. filing the document in a strict numeric sequence.

You will need to repeat this process with each topic until the entire program has been covered.

Documenting the learning program

At this point, it is important to document the program. This document will formalise the learning program and will include all of the components we have discussed so far.

Training and assessment strategies

This documentation should take the form of a training and assessment strategy (TAS) and must include as much information as possible. For example, when proposing a full qualification course, the TAS should include:

- the name of the organisation delivering the learning program
- the timeframe over which the training will take place—this could be several hours, weeks or months depending on the complexity and formal nature of the program

- the qualification code and name (if applicable)
- the units of competency that will be included in the qualification
- the target audience or clients
- the training and assessment arrangements, including:
 - › how the course has been structured—for example, will each unit be delivered as individual units or can they be clustered? *BSBPRO301A Recommend products and services* and *BSBCUS301A Deliver and monitor a service to customers* can be delivered independently of each other but, because they are very similar in nature, they can also be combined into one cluster for delivery and assessment purposes
 - › the delivery mode that will be used—for example, will the program be delivered in a classroom, on the job or by distance?
 - › how competency will be assessed—how will you ensure that learners are able to apply their new skills and knowledge?
 - › what **evidence** will be collected to show competence—how will you provide proof (evidence) that the learner can, indeed, apply the new skills and knowledge?
- which staff will be involved in delivering and assessing the program, as well as their qualifications
- how the program will be or has been validated—how did you ensure that the program is in line with industry and client requirements?
- what the learner can move on to as a result of the learning program—what other courses or job roles can the learner move into from this point?

The TAS shown in Table 1.2 overleaf documents a full qualification course. Learning programs, however, may not necessarily be as complex as this and may only include one or two topics. It is, nevertheless, important to construct and document all aspects of the program.

Note: The TAS form used here is a standard template used by most RTOs. The actual layout is up to individual organisations but it must contain the information outlined above.

When working for a registered training organisation, a TAS must be provided for every qualification the organisation offers. These may vary depending on the method of delivery, and the evidence and assessment will differ for distance, on-the-job and classroom delivery.

Looking at the work you did in Activity 1.9 opposite, how would you document the training session you envisaged? Using the template provided on page 23, put together a TAS for your program.

Activity 1.10




Reviewing the completed design

Before the program is delivered, a final review should be conducted with all stakeholders to ensure that everyone is happy with the program's design. This should be done at this stage while changes can still be made with relative ease. Once delivery of the program has commenced it can be difficult, if not impossible, to change aspects of the program and the desired outcomes could, potentially, be missed.

Table 1.2	TAS for a full, Certificate III in Business qualification	
Name of RTO	ACME College	
Delivery period	February to June 2011	
Code and title of qualification	BSB30107 Certificate III in Business	
Units of competency	Code	Title
	BSBINN201A	Contribute to workplace innovation
	BSBITU301A	Create and use databases
	BSBITU302A	Create electronic presentations
	BSBWOR301A	Organise personal work priorities and development
	BSBOHS201A	Participate in OHS processes
	BSBINM301A	Organise workplace information
	BSBPRO301A	Recommend products and services
	BSBCUS301A	Deliver and monitor a service to customers
	BSBDIV301A	Work effectively with others
	BSBFLM303C	Contribute to effective workplace relationships
	BSBFIA301A	Maintain financial records
	BSBFIA304A	Maintain general ledger
	This course is made up of 12 units of competency as outlined above.	
Clients	Residents from the surrounding areas as follows: <ul style="list-style-type: none"> • Year 12 graduates from surrounding area • Business owners wishing to upgrade their skills • Local residents wishing to change career tracks • International learners 	
Delivery and assessment arrangements	<p>Duration: This program is delivered over a period of 15 weeks.</p> <p>Organisation: The 12 units of competency in the qualification have been separated into 3 distinct business areas: 'Business Environment' split into 3 modules and containing 6 units; 'Customer Service', split into 2 modules and containing 4 units; and 'Finance', with 1 module containing 2 units. The program is organised so that candidates are provided with background information on whole industry-based knowledge and skills areas and are then given the opportunity to apply these skills in role plays, demonstrations and simulations. The alignment between the units of competency and the learning program appears below.</p>	

		Alignment with units of competency:						
		Program area	Unit(s) of competency	Expected hours				
	1. Business environment	Office operations	BSBINN201A BSBWOR301A BSBINM301A	95				
		Workplace health & safety	BSBOHS201A	20				
		Computer skills	BSBITU301A BSBITU302A	40				
	2. Customer service	Customer service skills	BSBPRO301A BSBCUS301A	50				
		Dealing with customers and colleagues	BSBDIV301A BSBFLM303C	50				
	3. Financial management	Financial management	BSBFIA304A BSBFIA301A	60				
Delivery and assessment arrangements continues	<p>Delivery modes The program is delivered entirely off the job at ACME's campus facilities. A combination of face-to-face trainer led theory classes and practical sessions involving group and individual activities will be used including:</p> <ul style="list-style-type: none"> • Role play • Simulations • Demonstration of skills • Field trips to local businesses • Projects and case studies • Written and/or oral examinations <p>Evidence-gathering techniques Business Studies is, essentially, an office-based occupation and can, therefore, be successfully assessed using methods as indicated below. ACME will offer alternative methods of assessment to learners with special needs, subject to discussion and mutual agreement on what is required, on an individual basis.</p>							
	Program area		A	B	C	D	E	F
	Office operations		x		x		x	x
	Workplace health & safety			x	x			x
	Computer skills		x		x			x
	Customer service		x				x	x
	Dealing with customers & colleagues		x				x	x
	Financial management			x	x	x		x
	Key:	A = Presentation		B = Oral questioning		C = Written test		
		D = Simulation		E = Role play		F = Case study/project		
Schedule		The learning program is conducted over 15 weeks (see attached timetable).						

continued

	Program area	Staff	Delivery & assessment	Competencies of staff	
				Technical	Assess
Delivery and assessment staff	Office operations	Dan Hill	x	x	
	Workplace health & safety	Dan Hill	x	x	x
	Computer skills	Terry Hill	x	x	x
	Customer service	Lee Perlitz	x	x	x
	Dealing with customers & colleagues	Lee Perlitz	x	x	x
	Financial management	Lee Perlitz	x	x	x
Assessment validation process	<p>The processes used to validate assessment in this program are:</p> <ul style="list-style-type: none"> • Program manager meets with representatives from local business community on an annual basis to check the performance standards required by the program are consistent with industry practice. • The program manager convenes an annual meeting of an assessment panel, which comprises members of the local business community and teachers to review evidence-gathering tools. • Assessment panel will also review, discuss and recommend any changes necessary due to updates or changes in training package. 				
Infrastructure	<ul style="list-style-type: none"> • All staff involved in the delivery and assessment of this qualification have direct access to the current version of the relevant training package, including the appropriate units of competency, assessment guidelines and qualifications structure. • All staff involved in delivering the program have access to trainer, assessor and candidate support materials relevant to their areas of delivery and assessment. • All assessors have access to print and electronic copies of the assessment tools that are used in this program. • The RTO has access to staff and training/assessment resources to meet the requirements of candidates with special needs and has an assessment process that incorporates reasonable adjustment procedures. • The RTO has reviewed the equipment and facility requirements for each unit of competency in the qualification and guarantees that it has access to the plant and equipment needed to implement the program. 				
Pathways	<p>Career prospects: On completion of this course, the learner could pursue employment opportunities as an office receptionist, in business administration within small-to-large organisations or government departments.</p> <p>Further education: On successful completion of this course, learners may consider further studies at a higher tertiary level. They can move on to Certificate IV Business and, thereafter, pursue a Diploma or a Degree in Business.</p>				
Program manager's endorsement:	<p>Lee Perlitz Director</p> 				
Date:	5/11/10				

Risk management

One more issue needs to be considered before signing off on the completed learning program—it is important to consider and manage any risks involved in the delivery of the learning program. This means looking at contingencies—all the things that could go wrong—and what you will do about them. These might include any of the following:

- Trainer calls in sick—who will deliver the training? How will you ensure the replacement trainer will be up to speed on the learning program?
- Missing learner—how will you ensure that a learner who has missed a session can catch up?
- Venue is unavailable—what will you do if the venue has not been booked or has been double booked?
- Faulty equipment—what will you do if the data projector for your PowerPoint presentation or overhead projector doesn't work? How will you copy class notes if the photocopier is faulty?
- Facilities inappropriate—what can you do if the room is stuffy without enough air or light?
- Access issues—is there enough parking? Is the venue accessible by public transport? How will learners get there? Is there sufficient and appropriate access for disabled learners?
- OHS issues—is the venue safe and secure? Are there sufficient facilities for learners' comfort—toilets, kitchen facilities, access to water?

These are important questions and must be addressed to ensure not only the health, safety and security of the learners, but also that the learning program is delivered smoothly, efficiently and with all due care.

Imagine that you are going to deliver the program you worked on in Activities 1.9 (p. 24) and 1.10 (p. 25). Describe, in detail, what risk management issues you would need to consider if the training were to take place in your workplace. One of your learners is in a wheelchair.

Activity 1.11



Assessment task 1.1

Review questions

1. List the key stakeholders in the design phase of a learning program.
2. Who, within your organisation, would you need to consult with in designing a learning program?
3. Describe why it is important to involve these stakeholders in the design of the program.
4. The purpose of a learning program may determine a number of things in the design phase. List at least three.
5. List at least four reasons why a client may wish to run a learning program.
6. Explain why it is important to consider a learner's language, literacy and numeracy skills.
7. Describe why it is important to confirm the competency standards to be achieved with the stakeholders in a learning program.
8. What is the name of the information website where VET competencies can be found?
9. List at least five different learner characteristics.
10. List the principles of adult learning.
11. Describe the function of the AQF.
12. What are the three standards imposed by AQTF?
13. What is the function of the NSSC?
14. What is the purpose of the TGA?
15. Describe the purpose of a quality management system and why it is important for an organisation to have one.
16. Describe how you would develop a specific program content. Use your own organisation or industry in your example.
17. Describe where you would look for existing learning resources for a program addressing your specific industry.
18. When would you use the following assessments?
 - a. Role play
 - b. Project
 - c. Oral questions
19. Why would it be necessary to 'break' down learning content?
20. What is a TAS? Explain why a training organisation would develop one.
21. Describe why it is important to document your learning program.
22. Explain why it is important to review a learning program before finalising it.
23. Who would you invite to review the learning program?
24. Describe the components of a learning program that should be considered in a risk management strategy.

Assessment task 1.2

Project

Using your own organisation or industry as a basis, complete the following.

In Activity 1.2 (p. 7) you were asked to look at possible training needs your organisation might have and what issues might need to be considered. You should now expand upon that work and properly define:

1. the purpose of the learning program
2. the competencies/standards on which your program will be based
3. the target audience and characteristics
4. what organisational policies and/or procedures will be addressed in your program
5. the learning content of the program
6. what resources you will use in the program and their sources
7. what assessment methods you might use to determine learner competency
8. how you will manage risk.

Produce a training and assessment strategy (TAS) document outlining your program and confirm your TAS with the relevant stakeholders in your organisation (e.g. provide minutes of any meetings held).

Competency map

The following grid will allow you to map the activities and assessments in this unit back to the required standards of competence.

Element	Performance criteria	Relates to page:	Activities	Assessment tasks
1. Define the parameters of the learning program	1.1 Clarify purpose and type of learning program with key stakeholders	2		
	1.2 Access and confirm the competency standards and other training specifications on which to base the learning program	8	1.1–1.4	1.1, 1.2
	1.3 Identify language, literacy and numeracy requirements of the program	8		
	1.4 Identify and consider characteristics of the target learner group	9		
2. Work within the Vocational Education and Training (VET) policy framework	2.1 Access relevant VET policies and frameworks, and apply to work practices	11		
	2.2 Identify changes to training packages and accredited courses and apply these to program development	16	1.5, 1.6	1.1, 1.2
	2.3 Conduct work according to organisational quality assurance policies and procedures	17		
3. Develop program content	3.1 Research, develop and document specific subject matter content according to agreed design options	18		
	3.2 Evaluate existing learning resources for content relevance and quality	19	1.7, 1.8	1.1, 1.2
	3.3 Specify assessment requirements for the learning program	21		
4. Design the structure of the learning program	4.1 Break the learning content into manageable segments and document the timeframe for each segment	23		
	4.2 Determine and confirm delivery strategies and required assessment methods and tools	24		
	4.3 Document complete learning program in line with organisational requirements	24	1.9–1.11	1.1, 1.2
	4.4 Review complete program with key stakeholders and adjust as required	25		
	4.5 Ensure a safe learning progression by analysing risks in the learning environment and applying a risk control plan	29		

Required skills	Relates to page/s:	Activities	Assessment tasks
<ul style="list-style-type: none"> organisational skills to ensure resources are available and suitable evaluation skills to determine the time required for each learning segment and the overall timelines of the learning program cognitive skills to develop the learning program content and design its structure language, literacy and numeracy skills to read and interpret a range of documentation, including technical and subject matter documents, references and texts 	<p>3–8</p> <p>20</p> <p>22–8</p>	1.1, 1.2	1.2
Required knowledge			
<ul style="list-style-type: none"> information about training package developers and course accreditation agencies responsible for specific learning program parameters training packages and relevant competency standards to be used as the basis of the learning program other performance standards and criteria to be used as the basis of the learning program, where relevant distinction and relationship between a training package/ accredited course, learning strategy and learning program, where linked different purposes and focus of learning programs sound knowledge of learning principles instructional design principles relating to different design options for learning program design and structure availability and types of different relevant learning resources, learning materials and pre-developed learning activities methodology relating to developing and documenting new learning activities and related learning materials different delivery modes and methods relevant policies, legal requirements, codes of practice and national standards, including Commonwealth and state or territory legislation that may affect training and assessment in the VET sector relevant OHS knowledge relating to the work role, and OHS considerations that need to be included in the learning program 	<p>20</p> <p>14</p> <p>7–8</p> <p>3</p> <p>20</p> <p>18–19</p> <p>26</p> <p>3–6</p>	1.3–1.11	1.1, 1.2