

CIPD

*Championing better
work and working lives*

Foundation level Specification Learning and Development

Regulated Qualifications Framework (RQF)

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Key information

Qualification objective

Foundation qualifications reflect a wide range of relevant practical skills in learning and development practice. They are suited to individuals who:

- are aspiring to, or embarking on, a career in L&D
- are working in the field of L&D in a support role and wish to develop their knowledge and skills
- have responsibility for L&D activities and decisions within an organisation without a specialist function.

Total qualification time

Total Qualification Time (TQT) is the number of hours it is estimated that a candidate will take to complete a qualification from start to finish and includes guided learning hours, self study, preparation and assessment.

Assessment

Candidates are assessed via a range of assessment methods to ensure that all the learning outcomes and assessment criteria are met in a way that enhances their learning experience. The assessments will allow candidates to demonstrate a clear grasp of the concepts and their ability to link theory to practice and to communicate clearly in the HR field at the appropriate level. Although a variety of assessment methods may be used, the demands made on candidates within and between centres must be comparable to ensure consistency of assessment.

All unit assessment criteria are summatively assessed. Formative assessment is also encouraged within each unit.

Assessment methods may include:

- assignments
- case studies
- integrated work activities
- group and individual presentations
- projects
- reports
- time constrained tests
- examinations
- Viva Voce

Competency-based assessment may also be used in centres that are approved for this method of assessment and have assessors that are occupationally competent.

Centres may choose activities from the CIPD Assessment Bank or design their own. Where a centre devises its own assessments, these must be approved by the CIPD before use.

All centre-marked assessments are subject to external verification to ensure that standards are judged comparatively against internal and external benchmarks.

Credit transfer, exemptions, and recognition of prior learning

CIPD encourages the recognition of previous achievements of candidates. Credit transfer, exemptions, and recognition of prior learning play an important part in this by supporting candidate progression.

During the initial diagnostic interview with candidates any credit transfer, exemption and RPL opportunities should be discussed and the appropriate evidence collected.

Credit transfer

Credit transfer is the process of using credits awarded in the context of one of the CIPD Level 3 Foundation, Level 5 Intermediate or Level 7 Advanced qualifications or other RQF qualification towards the achievement requirements of another CIPD qualification of the same level/type.

Exemption

Exemption is defined as the facility for a candidate to claim exemption from some of the achievement requirements of a CIPD qualification, using evidence of certificated achievement which does not fall within the definition of credit transfer but is deemed by the CIPD to be of equivalent level, content and value.

This means that candidates who have certificated achievements which do not fall within the definition of a credit transfer, as described above, can claim exemption from units/modules within CIPD qualifications that are deemed by CIPD to be of equal level, content and value.

Recognition of prior learning (RPL)

Where candidates do not have prior certificated achievements but do have some non-formal or informal learning, they may seek recognition of prior learning (RPL). We define RPL as a method of assessment, leading to the award of credit that considers whether a candidate can demonstrate that they can meet the assessment requirements for a unit/module through knowledge, understanding and skills they already possess and do not need to develop through a course of learning.

Progression opportunities

CIPD has 3 sizes of qualification, Awards, Certificates, and Diplomas. Candidates can widen their knowledge further by undertaking more units at any time.

On completion of the CIPD Level 3 Award in Learning and Development (3-12 credits), candidates can progress their studies by undertaking further units and gaining more credits to achieve a CIPD Level 3 Certificate in Learning and Development (26 credits) or a CIPD Level 3 Diploma in Learning and Development (38 credits).

Candidates can also progress their studies further by undertaking the CIPD Intermediate Level qualifications.

Rules of combination for CIPD awarded¹ Level 3* Award, Certificate and Diploma in Learning and Development

¹CIPD awarded qualifications are offered at centres with no qualification awarding powers

* RQF level 3, comparable to Level 5 in Ireland, Level 6 in Scotland and EQF level 4

List of units for Level 3 Award, Certificate and Diploma in Learning and Development

Core units	Unit code	Credit value	Guided learning hours
Becoming an Effective Learning and Development Practitioner	3BEP	4	20
Learning and Development and the Organisation	3LDO	4	20
Identifying Learning and Development Needs	3LDN	3	15
Designing Learning and Development Activities	3DES	6	30
Delivering Learning and Development Activities	3DEL	6	30
Evaluating Learning and Development Activities	3ELD	3	15

Optional units:	Unit code	Credit value	Guided learning hours
Using Technology to Facilitate Learning	3TFL	6	30
Enhancing Learner Engagement	3ELE	6	30
Supporting Collective and Social Learning	3SCL	6	30
Supporting Individual Learning through Coaching and Mentoring	3LCM	6	30
Assessing Learning and Development	3ASL	6	30
Organising Learning and Development events	3LDE	6	30

Rules of combination for CIPD awarded qualifications:

Level 3 Award in Learning and Development = 3 to 12 credits and a TQT of between 30 and 120 hours

- Free choice of units from both tables above to a minimum of 3 credits and a maximum of 12 credits

Level 3 Foundation Certificate in Learning and Development = 26 credits and a TQT of 260 hours

- Take all core units to a total of 26 credits

Level 3 Foundation Diploma in Learning and Development = 38 credits and a TQT of 380 hours

- Take all core units to a total of 26 credits
- Choose two optional units to a total of 12 credits

Rules of combination for CIPD approved¹ Level 3* Foundation qualifications

¹ CIPD approved qualifications are offered at centres with qualification awarding powers, e.g. university awards and university validated awards

* RQF Level 3, comparable to Level 5 in Ireland, Level 6 in Scotland and EQF Level 4

List of units for Level 3* Foundation qualifications

Core units	Unit code	Credit value (FHEQ)	Guided learning hours
Becoming an Effective Learning and Development Practitioner	3BEP	4	20
Learning and Development and the Organisation	3LDO	4	20
Identifying Learning and Development Needs	3LDN	3	15
Designing Learning and Development Activities	3DES	6	30
Delivering Learning and Development Activities	3DEL	6	30
Evaluating Learning and Development Activities	3ELD	3	15

Optional units	Unit code	Credit value	Guided learning hours
Using Technology to Facilitate Learning	TFL	6	30
Enhancing Learner Engagement	3ELE	6	30
Supporting Collective and Social Learning	3SCL	6	30
Supporting Individual Learning through Coaching and Mentoring	3LCM	6	30
Assessing Learning and Development	3ASL	6	30
Organising Learning and Development events	3LDE	6	30

Rules of combination for CIPD approved qualifications:

Level 3 Foundation Certificate in Learning and Development (equivalent to 26 credits/130 guided learning hours (glh))

- map to learning outcomes from all core units (equating to 26 credits/130 glh)

Level 3 Foundation Diploma in Learning and Development (equivalent to 38 credits/190 glh)

- map to learning outcomes from all core units (equating to 26 credits/130 glh)
- map to learning outcomes from whole optional units (equating to a minimum of 12 credits /60 glh from optional units) , units chosen must form a coherent programme
- 51% of the qualification must be delivered and assessed at the level of the CIPD qualification; however a maximum of 49% of the qualification may be delivered and assessed at one level above.

Becoming an Effective Learning and Development Practitioner

Unit title	Becoming an Effective Learning and Development Practitioner
Level	3*
Credit value	4
Unit code	3BEP
Unit review date	September 2019

*RQF Level 3, comparable to Level 5 in Ireland, Level 6 in Scotland and EQF Level 4

Purpose and aim of unit

There are many different learning and development (L&D) roles and to be effective in any of them L&D practitioners require a wide range of skills and knowledge. Along with the essential technical skills of identifying learning needs, designing and delivering L&D activities and evaluating L&D, practitioners also need to understand the organisations they work for, or with, and the learners they support. Employer surveys also tell us that key work skills and behaviours are equally important, particularly communication skills, work-management behaviours, and collaborative working behaviours. This unit enables learners to develop a deep understanding of the knowledge, skills and behaviours required by L&D practitioners, and the importance of continuing professional development (CPD). It requires learners to undertake a self-assessment against identified requirements and devise their own personal/ professional development plan, detailing and justifying activities to facilitate their development as an L&D practitioner. To complete the plan, learners will update it with the outcomes of activities and their reflections on the learning gained.

This unit is suitable for persons who:

- are aspiring to, or embarking on, a career in L&D
- are already working in the field of L&D and aim to re-assess and develop their knowledge, skills and behaviours as an L&D practitioner
- engage in CPD to enhance their professional practice.

Learning outcomes

On successful completion of this unit, learners will:

- 1 Understand the knowledge, skills and behaviours required of learning and development practitioners.
- 2 Be able to devise a plan to meet own learning and development needs.
- 3 Be able to implement and review own learning and development plan.

Guided learning hours

The guided learning hours for this unit would normally be considered to be 20, with an additional 20 hours of self-directed learning for reading and the preparation of assessment evidence.

Unit content

Indicative content is provided for each of the learning outcomes of the unit. The content is neither prescriptive nor exhaustive but should enable achievement of the learning outcomes.

1 Understand the knowledge, skills and behaviours required of learning and development practitioners.

Overview of CIPD Profession Map and L&D Professional Area and any other relevant frameworks.

Overview of L&D Roles and titles: e.g. trainer, tutor, L&D consultant, training adviser, L&D business partner, training officer, L&D/training manager, OD roles, assessor, L&D roles external to the organisation, coach, mentor; differences and similarities.

Overview of technical knowledge and skills required: e.g. the organisational context of L&D; the training cycle – how to identify needs, how to design effective learning, delivery skills, how to evaluate L&D; how to assess learning; understanding learners and their motivations; coaching and mentoring skills; skills relating to technology enabled learning.

Communication skills: principles of effective communication; communication methods and when/how to use them; communications styles; audiences for / recipients of L&D communications.

Work-management behaviours: (NB: particular reference to CIPD Profession Map behaviour 'Role Model'). Basic self-management and organisation techniques: e.g. clarifying work requirements; planning and organising work; setting and managing priorities; monitoring progress; honouring commitments and meeting deadlines; completing work projects; showing enthusiasm; seeking and acting on feedback.

Collaborative working behaviours: (NB: particular reference to CIPD Profession Map behaviour 'Collaborative'). 'Working with others' skills, e.g. taking time to understand and value others; relationship building techniques; team work and effective teams; using appropriate and frequent communication to build and maintain relationships; handling disagreements and interpersonal problem solving techniques.

Concept of CPD: philosophy of continuous professional development and updating, CPD models and theory; taking personal responsibility for learning, development and performance; the concept of reflective practice; CIPD and other sector and professional requirements for CPD.

2 Be able to devise a plan to meet own learning and development needs.

Self-assessment: ways of matching perceptions and evidence of own knowledge and/or performance against pre-identified requirements; how to use self-assessment facilities e.g. the CIPD's 'My HR Map' facility; how to find balance and avoid bias in self-assessment.

Overview of L&D activities in relation to meeting own needs (NB: range of L&D activities covered in full detail in later units) e.g. formal courses, self-directed learning, coaching, mentoring, work shadowing, skills practise, on-job learning. *Personal/Professional Development Plans:* different formats and examples.

3 Be able to implement and review own learning and development plan.

The concept of the reflective learner: reasons for, and models of, learner reflection; how to reflect on learning; how to record outcomes and reflections.

Unit assessment

To achieve this unit, the evidence the learner presents for assessment must demonstrate that they have met all the learning outcomes and assessment criteria.

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Understand the knowledge, skills and behaviours required of learning and development practitioners.	1.1 Describe different learning and development roles and titles. 1.2 Explain the technical knowledge and skills required of learning and development practitioners. 1.3 Explain the importance of effective communication skills for learning and development practitioners. 1.4 Explain work-management and collaborative-working behaviours and why these are important for learning and development practitioners. 1.5 Explain the concept and importance of CPD for learning and development practitioners.
2 Be able to devise a plan to meet own learning and development needs.	2.1 Undertake a self-assessment against the knowledge, skills, and behaviours required of learning and development practitioners and identify own learning and development needs. 2.2 Select and justify learning and development activities to meet own identified needs and devise a plan for putting these into practice.
3 Be able to implement and review own learning and development plan.	3.1 Implement own development plan, recording outcomes of, and own reflections on selected activities.

Learning resources for unit: 3BEP

This section provides suggestions for suitable resources for this unit. The list is indicative only and should not be considered as prescriptive or exhaustive.

Books

- 1 BEEVERS, K. and REA, A. (2016) *Learning and development practice in the workplace*. 3rd ed. London: Chartered Institute of Personnel and Development.
- 2 FRIEDMAN, A. (2012) *Continued professional development: lifelong learning of millions*. Abingdon: Routledge.
- 3 JOHNS, T. and PERKINS, G. (2016) Developing professional practice. In: S. TAYLOR and C. WOODHAMS (eds) *Studying human resource management*. 2nd ed. London: Chartered Institute of Personnel and Development.
- 4 MEGGINSON, D. and WHITAKER, V. (2007) *Continuing professional development*. 2nd ed. London: Chartered Institute of Personnel and Development.
- 5 WINSTANLEY, D. (2005) *Personal effectiveness: a guide to action*. London: Chartered Institute of Personnel and Development.

Online resources

- 1 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. CIPD *Megatrends: the trends shaping work and working lives*. Available at www.cipd.co.uk/cipd-hr-profession/whats-new/megatrends.aspx
- 2 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. *A wealth of resources on HR and learning and development*. Available at www.cipd.co.uk/hr-resources/a-z
- 3 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Aligning L&D with business objectives [online]*. Podcast 103. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/103-aligning-ld-business-objectives.aspx> [Accessed 18 April 2016]

Key journals

- 1 Human Resource Development International Available at: www.cipd.co.uk/journals
- 2 Human Resource Development Quarterly Available at: www.cipd.co.uk/journals
- 3 International Journal of Training and Development Available at: www.cipd.co.uk/journals

- 4 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *Landing transformational change [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/landing-transformational-change_2014.pdf [Accessed 18 April 2016].
- 5 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Landing transformational change [online]*. Podcast 107. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/107-landing-transformational-change.aspx> [Accessed 18 April 2016].
- 6 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT and UNIVERSITY OF BATH. School of Management. (2015) *Landing transformational change: closing the gap between theory and practice [online]*. Research report. London: CIPD. Available at: https://www.cipd.co.uk/binaries/landing-transformation-change_2015-gap-theory-practice.pdf [Accessed 18 April 2016].
- 7 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *L&D: evolving roles, enhancing skills [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/l-d-evolving-roles-enhancing-skills_2015.pdf [Accessed 18 April 2016].
- 8 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *L&D: new challenges, new approaches [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/l-and-d_2014-new-challenges-new-approaches.pdf [Accessed 18 April 2016].
- 9 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Learning and development 2015: annual survey report [online]*. London: CIPD. Available at: http://www.cipd.co.uk/binaries/learning-development_2015.pdf [Accessed 18 April 2016].
- 10 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *Rethinking staff inductions [online]*. Podcast 89. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/89-rethinking-staff-inductions.aspx> [Accessed 18 April 2016].
- 11 TOWARDS MATURITY. (2015) *Embracing change: improving performance for business, individuals and the L&D Team [online]*. Article. London: Towards Maturity. Available at: <http://www.towardsmaturity.org/article/2015/11/05/embracing-change-improving-performance-benchmark/> [Accessed 18 April 2016].

Websites

- 1 www.ahrd.org
Website of the Academy of Human Resource Development
- 2 www.cipd.co.uk
Website of the Chartered Institute of Personnel and Development (CIPD)

Learning and Development and the Organisation

Unit title	Learning and Development and the Organisation
Level	3*
Credit value	4
Unit code	3LDO
Unit review date	September 2019

*RQF Level 3, comparable to Level 5 in Ireland, Level 6 in Scotland and EQF Level 4

Purpose and aim of unit

To be effective, learning and development (L&D) practitioners must understand the organisations they work in or with, and the external factors which impact on those organisations. Without this understanding there is a danger that L&D activities may not be appropriate for the context in which they are delivered or may be unbalanced in terms of addressing both individual AND organisational needs and benefitting all parties. This unit enables learners to develop their understanding of organisations, the reasons they are established and the factors that differentiate them, and their operating environments. Having built a sound base of knowledge about organisations, the unit moves on to look at some different ways L&D is positioned and the typical services L&D provides. Finally, the unit assists learners to consider and evaluate the important question of how L&D can support the achievement of organisational goals.

This unit is suitable for persons who:

- are aspiring to, or embarking on, a career in L&D
- are already working in the field of L&D and aim to develop their understanding of organisations and the organisational context of L&D.

Learning outcomes

On completion of this unit, learners will:

- 1 Understand different types of organisations and their operating environments.
- 2 Understand different ways learning and development is positioned within organisations.
- 3 Understand how learning and development can support the achievement of organisational objectives.

Guided learning hours

The guided learning hours for this unit would normally be considered to be 20, with an additional 20 hours of self-directed learning for reading and the preparation of assessment evidence.

Unit content

Indicative content is provided for each of the learning outcomes of the unit. The content is neither prescriptive nor exhaustive but should enable achievement of the learning outcomes.

1 Understand different types of organisations and their operating environments.

Reasons why L&D practitioners need to understand the organisations they work in or with.

Reasons why organisations are established: e.g. business, personal, political, religious, economic, social reasons; to accomplish set goals and objectives; to make a profit; to provide a service; to co-ordinate particular activities.

Categories and types of organisation: e.g. private, public, third sector; different legal/business status e.g. sole traders, partnerships, companies; different sizes: global; large, small/medium enterprises, micro-businesses.

Organisation structures: e.g. traditional, bureaucratic, matrix, hierarchical, flat, virtual; how different structures relate to business purpose; examples of different organisations and their structures; links between structure and organisational culture.

Definitions of the operating (or business) environment: e.g. the wider environment in which the organisation operates e.g. sector, economy, marketplace, competitors, suppliers and customers.

Analysis Tools: e.g. PESTLE, Porter's 5 forces, SWOT.

External factors: e.g. effects of political situation on the organisation's business (current government policies and initiatives and attitude to 'business'); prevalent economic factors e.g. recession, downturn, upturn; social and cultural factors e.g. migration, diversity, social mobility; impact of technology and technological innovations; legislation and pending legislative changes that regulate the business; environmental and ethical concerns for the business; effects of globalisation.

2 Understand different ways learning and development is positioned within organisations.

Different ways the L&D function/services are arranged or accessed: e.g. L&D as part of HR; L&D as a separate and distinct function; L&D services accessed externally; balance of responsibility for L&D between the L&D function and operational line managers; how the L&D function differs in different sizes of organisation from micros/SMEs to global organisations.

Factors which affect arrangement/access of L&D: e.g. organisation size, culture, budget; sector practice and tradition; types of L&D need and availability of relevant provision.

Summary of L&D services: e.g. provision of formal and informal L&D activities; induction; coaching and mentoring programmes; management development activities; support to line managers in L&D processes; support for technology enabled individual learning; managing L&D events; maintaining L&D records.

3 Understand how learning and development can support the achievement of organisational objectives.

'Triangulation' in relation to L&D practice - learner, trainer and organisation.

How L&D can support the achievement of organisational objectives: e.g. maintaining awareness of learning and development needs so that timely action can be taken; building organisation capability through design and delivery of effective L&D activities; supporting line-manager performance; ensuring readiness for change and emerging opportunities; motivating and engaging employees; providing insights and informing/shaping organisational strategy.

Unit assessment

To achieve this unit, the evidence the learner presents for assessment must demonstrate that they have met all the learning outcomes and assessment criteria.

Learning outcomes The learner will:	Assessment criteria The learner can:
1 Understand different types of organisations and their operating environments.	1.1 Explain different reasons why organisations are established and different ways of categorising them. 1.2 Describe different ways organisations are structured and reasons for this. 1.3 Use an analysis tool to identify the external factors which impact on how an organisation operates.
2 Understand different ways learning and development is positioned within organisations.	2.1 Describe different ways learning and development services are arranged within, or accessed externally by organisations. 2.2 Explain the factors which affect how organisations arrange or access learning and development services.
3 Understand how learning and development can support the achievement of organisational objectives.	3.1 Describe a range of services provided by learning and development and for whom they are typically provided. 3.2 Evaluate how learning and development can support the achievement of organisational objectives.

Learning resources for unit: 3LDO

This section provides suggestions for suitable resources for this unit. The list is indicative only and should not be considered as prescriptive or exhaustive.

Books

- 1 BEEVERS, K. and REA, A. (2016) *Learning and development practice in the workplace*. 3rd ed. London: Chartered Institute of Personnel and Development.
- 2 HUCZYNSKI, A.A. and BUCHANAN, D.A. (2013) *Organizational behaviour*. 8th ed. Harlow: Pearson Education.
- 3 MCGUIRE, D. (2014) *Human resource development*. 2nd ed. London: Sage Publications.
- 4 STEWART, J. and ROGERS, P. (2012) *Developing people and organisations*. London: Chartered Institute of Personnel and Development.

Key journals

- 1 Human Resource Development International
Available at: www.cipd.co.uk/journals
- 2 Human Resource Development Quarterly
Available at: www.cipd.co.uk/journals
- 3 International Journal of Training and Development
Available at: www.cipd.co.uk/journals
- 4 European Journal of Training and Development
- 5 Advances in Developing Human Resources

Online resources

- 1 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. CIPD *Megatrends: the trends shaping work and working lives*. Available at www.cipd.co.uk/cipd-hr-profession/whats-new/megatrends.aspx
- 2 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. A wealth of resources on HR and learning and development. Available at: <http://www.cipd.co.uk/hr-resources/a-z/default.aspx>
- 3 BERSIN, J. (2012) *The new best-practices of a high-impact learning organization [online]*. Blog. Oakland, CA: Bersin by Deloitte. Available at: <http://www.bersin.com/blog/post/The-New-Best-Practices-of-a-High-Impact-Learning-Organization.aspx> [Accessed 12 April 2016].
- 4 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Aligning L&D with business objectives [online]*. Podcast 103. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/103-aligning-l-d-business-objectives.aspx> [Accessed 18 April 2016]
- 5 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *Landing transformational change [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/landing-transformational-change_2014.pdf [Accessed 18 April 2016].

- 6 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Landing transformational change [online]*. Podcast 107. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/107-landing-transformational-change.aspx> [Accessed 18 April 2016].
- 7 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT and UNIVERSITY OF BATH. School of Management. (2015) *Landing transformational change: closing the gap between theory and practice [online]*. Research report. London: CIPD. Available at: https://www.cipd.co.uk/binaries/landing-transformation-change_2015-gap-theory-practice.pdf [Accessed 18 April 2016].
- 8 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *L&D: evolving roles, enhancing skills [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/l-d-evolving-roles-enhancing-skills_2015.pdf [Accessed 18 April 2016].
- 9 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *L&D: new challenges, new approaches [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/l-and-d_2014-new-challenges-new-approaches.pdf [Accessed 18 April 2016].
- 10 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Learning and development 2015: annual survey report [online]*. London: CIPD. Available at: http://www.cipd.co.uk/binaries/learning-development_2015.pdf [Accessed 18 April 2016].
- 11 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *Rethinking staff inductions [online]*. Podcast 89. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/89-rethinking-staff-inductions.aspx> [Accessed 18 April 2016].
- 12 JENNINGS, C. (2010) *Five barriers to effective learning in organizations [online]*. Blog. Winchester: Charles Jennings. Available at: <http://charles-jennings.blogspot.co.uk/2010/04/five-barriers-to-effective-learning-in.html> [Accessed 12 April 2016].
- 13 TOWARDS MATURITY. (2015) *Embracing change: improving performance for business, individuals and the L&D Team [online]*. Article. London: Towards Maturity. Available at: <http://www.towardsmaturity.org/article/2015/11/05/embracing-change-improving-performance-benchmark/> [Accessed 18 April 2016].
- 14 WOOD, J. (2013) *10 reasons why a 'learning culture' is crucial to your organization [online]*. Blog. Bury: Motivated and Competent Ltd. Available at: <http://www.motivated-and-competent.com/latest-updates/10-reasons-why-a-learning-culture-is-crucial-to-your-organisation/> [Accessed 12 April 2016].

Websites

- 1 www.ahrd.org
Website of the Academy of Human Resource Development
- 2 <http://www.berstin.com/Practice/Browse.aspx?p=Learning-@-Development>
Website of Bersin by Deloitte, learning and development portal
- 3 www.cipd.co.uk
Website of the Chartered Institute of Personnel and Development (CIPD)
- 4 <http://managementhelp.org/training/>
Website of the Free Management Library, with a range of resources on learning and development
- 5 <http://skillsfundingagency.bis.gov.uk>
Website of the Skills Funding Agency
- 6 <https://www.td.org/Publications/Blogs/L-and-D-Blog>
Website of the Association for Talent Development, Learning and Development Blog
- 7 www.ufhrd.co.uk
Website of the University Forum for Human Resource Development
- 8 www.ukces.org.uk
Website of the UK Commission for Employment and Skills

Identifying Learning and Development Needs

Unit title	Identifying Learning and Development Needs
Level	3*
Credit value	3
Unit code	3LDN
Unit review date	September 2019

*RQF Level 3, comparable to Level 5 in Ireland, Level 6 in Scotland and EQF Level 4

Purpose and aim of unit

For individuals and their organisations to respond to changing environments and exploit emerging opportunities they need to ensure the quality and currency of their skills, knowledge and capabilities. Taking a pro-active approach to identifying learning needs is a key part of this, and often the responsibility of the L&D practitioner. This unit supports the development of the skills required to undertake an effective identification of others' learning needs. It begins with a consideration of why individual and group learning needs arise and why it is important for both organisations and individuals to be aware of them. The unit goes on to explore the types of information required for identifying L&D needs and different methods for collecting and analysing this information. Learners are required to apply their knowledge to the practical identification and prioritisation of individual or group needs, and to specify their findings in an appropriate format, along with any other identified factors which might impact on the learning solution

This unit is suitable for persons who:

- are aspiring to, or embarking on, a career in L&D
- are already working in the field of L&D and aim to develop their knowledge and skills in relation to identifying L&D needs.

Learning outcomes

On completion of this unit, learners will:

- 1 Understand how learning and development needs arise and why it is important to be aware of them.
- 2 Be able to identify, prioritise and specify learning and development needs.

Guided learning hours

The guided learning hours for this unit would normally be considered to be 15, with an additional 15 hours of self-directed learning for reading and the preparation of assessment evidence.

Unit content

Indicative content is provided for each of the learning outcomes of the unit. The content is neither prescriptive nor exhaustive but should enable achievement of the learning outcomes.

1 Understand how learning and development needs arise and why it is important to be aware of them.

How learning needs arise: gaps in current skill sets against performance requirements (underperformance); gaps in current performance requirements and evolving or future performance requirements (future development needs); internal and external factors, e.g. government intervention or changes in legislation, changes to organisational strategy, processes, products or services; maintenance, updating or development of employee skills or knowledge, professional development requirements, responding to individual aspirations and talents, promotions, new starters; major structural changes: mergers/acquisitions, downsizing and redeployment.

Groups: any group of people likely to have some common learning needs and where group ILN is therefore appropriate, e.g. new recruits, line managers, sales team, customer-facing staff, any group of staff affected by a particular change or new development.

Benefits: e.g. maintaining individual, team and organisational competence; superior readiness for change and new demands; ability to respond to market place developments more quickly; enhanced worker/ performance data and related ability to deploy people where and how they can be most effective; increased worker motivation and engagement. Meeting individual aspirations.

2 Be able to identify, prioritise and specify learning and development needs.

ILN Information: Requirements factors: e.g. current performance requirements, emerging/future performance requirements, new role requirements, team requirements.

Capability factors: e.g. current skills and knowledge, current performance levels, transferable skills, soft skills and behaviours. Individual factors which may affect learning solutions: e.g. personal information, particular needs, learning history, learning preferences, time/location flexibility, potential impact on other work areas, potential impact on other teams or team members, priorities.

Range of methods for identifying learning needs: e.g. job analysis, learner interview, learner observations, assessments, performance review, skills audits, manager interviews, questionnaires, surveys, customer/other feedback.

Priorities: e.g. in relation to work goals, time, finance, compliance issues, aspirations.

Other factors which might affect choice of learning solution: e.g. particular needs, learning history, learning preferences, time/location flexibility, potential impact on other work areas, potential impact on other teams or team members, priorities, alignment with other L&D initiatives, costs, eligibility requirements, organisational constraints, organisational practices.

Factors of good practice in relation to identifying learning needs: e.g. equality, ethics, fairness and access; constructive feedback skills; data protection and confidentiality.

Unit assessment

To achieve this unit, the evidence the learner presents for assessment must demonstrate that they have met all the learning outcomes and assessment criteria.

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Understand how learning and development needs arise and why it is important to be aware of them.	1.1 Explain key reasons why learning needs may arise for individuals and groups. 1.2 Explain the benefits to individuals and their organisations of identifying individual and group learning needs.
2 Be able to identify, prioritise and specify learning and development needs.	2.1 Explain the information which should be collected for an individual or group learning needs analysis. 2.2 Use a range of methods for collecting information relating to individual or group learning needs. 2.3 Identify and prioritise learning needs from gathered information. 2.3 Specify learning need and other factors which might affect the choice of learning solutions.

Learning resources for unit: 3LDN

This section provides suggestions for suitable resources for this unit. The list is indicative only and should not be considered as prescriptive or exhaustive.

Books

- 1 BEEVERS, K. and REA, A. (2016) *Learning and development practice in the workplace*. 3rd ed. London: Chartered Institute of Personnel and Development.
- 2 KNOWLES, M.S., HOLTEN III, E.F. and SWANSON, R.A. (2015) *The adult learner: the definitive classic in adult education and human resource development*. 8th ed. Abingdon: Routledge.
- 3 STEWART, J. and CURETON, P. (2014) *Designing, delivering and evaluating L&D: essentials for practice*. London: Chartered Institute of Personnel and Development.

Key journals

- 1 Human Resource Development International
Available at: www.cipd.co.uk/journals
- 2 Human Resource Development Quarterly
Available at: www.cipd.co.uk/journals
- 3 International Journal of Training and Development
Available at: www.cipd.co.uk/journals

Online resources

- 1 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. CIPD Megatrends: the trends shaping work and working lives. Available at www.cipd.co.uk/cipd-hr-profession/whats-new/megatrends.aspx
- 2 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. A wealth of resources on HR and learning and development. Available at: <http://www.cipd.co.uk/hr-resources/a-z/default.aspx>
- 3 BATLEY, D. (2013) *How to identify learning and development needs [online]*. Blog. London: ILM. Available at: <https://www.i-l-m.com/Insight/Inspire/2013/April/identifying-L-D-needs> [Accessed 12 April 2016].
- 4 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Aligning L&D with business objectives [online]*. Podcast 103. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/103-aligning-l-d-business-objectives.aspx> [Accessed 18 April 2016]

- 5 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *Landing transformational change [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/landing-transformational-change_2014.pdf [Accessed 18 April 2016].
- 6 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Landing transformational change [online]*. Podcast 107. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/107-landing-transformational-change.aspx> [Accessed 18 April 2016].
- 7 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT and UNIVERSITY OF BATH. School of Management. (2015) *Landing transformational change: closing the gap between theory and practice [online]*. Research report. London: CIPD. Available at: https://www.cipd.co.uk/binaries/landing-transformation-change_2015-gap-theory-practice.pdf [Accessed 18 April 2016].
- 8 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *L&D: evolving roles, enhancing skills [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/l-d-evolving-roles-enhancing-skills_2015.pdf [Accessed 18 April 2016].
- 9 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *L&D: new challenges, new approaches [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/l-and-d_2014-new-challenges-new-approaches.pdf [Accessed 18 April 2016].
- 10 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Learning and development 2015: annual survey report [online]*. London: CIPD. Available at: http://www.cipd.co.uk/binaries/learning-development_2015.pdf [Accessed 18 April 2016].
- 11 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *Rethinking staff inductions [online]*. Podcast 89. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/89-rethinking-staff-inductions.aspx> [Accessed 18 April 2016].
- 12 LITTLE, B. (2016) *Learning needs analyses [online]*. Blog. [-]: MindTools Corporate. Available at: <https://www.mindtools.com/blog/corporate/2016/01/22/learning-needs-analyses/> [Accessed 12 April 2016].
- 13 LOPKER, G. (2016) *10 training needs analysis tips for instructional designers and trainers [online]*. Blog. Alexandria, VA: Association for Talent Development. Available at: <https://www.td.org/Publications/Blogs/L-and-D-Blog/2016/04/10-Training-Needs-Analysis-Tips-for-Instructional-Designers-and-Trainers> [Accessed 12 April 2016].
- 14 TOWARDS MATURITY. (2015) *Embracing change: improving performance for business, individuals and the L&D Team [online]*. Article. London: Towards Maturity. Available at: <http://www.towardsmaturity.org/article/2015/11/05/embracing-change-improving-performance-benchmark/> [Accessed 18 April 2016].

Websites

- 1 www.ahrd.org
Website of the Academy of Human Resource Development
- 2 www.cipd.co.uk
Website of the Chartered Institute of Personnel and Development (CIPD)

Designing Learning and Development Activities

Unit title	Designing Learning and Development Activities
Level	3*
Credit value	6
Unit code	3DES
Unit review date	September 2019

*RQF Level 3, comparable to Level 5 in Ireland, Level 6 in Scotland and EQF Level 4

Purpose and aim of unit

The quality and success of L&D activity is largely determined by how well it is designed. This unit aims to develop the knowledge and skills required to become an effective designer of learning activity. The unit begins with an exploration of key factors and theories, including a consideration of individual learner differences, which underpin the design of L&D activities and the essential information needed by designers in order for learning to be made meaningful and relevant. The unit moves on to practical skills development requiring learners to accurately convert learning requirements information into clearly stated learning objectives and to select and sequence learning methods and content to addresses objectives and accommodate individual differences. Learners are also required to consider and include appropriate methods for monitoring and assessing learning and to select learning resources which will support their L&D activity. Finally learners are required to specify their L&D design in a recognised and useable format.

This unit is suitable for persons who:

- are aspiring to, or embarking on, a career in L&D
- are already working in the field of L&D and aim to develop their knowledge and skills in relation to designing L&D activities

Learning outcomes

On completion of this unit, learners will:

- 1 Understand factors which inform the design of learning and development activities.
- 2 Know how to devise clear objectives for a learning and development activity.
- 3 Be able to design an inclusive learning and development activity which address identified learning and development objectives.
- 4 Be able to specify the learning and development activity in a recognised and useable format.

Guided learning hours

The guided learning hours for this unit would normally be considered to be 30, with an additional 30 hours of self-directed learning for reading and the preparation of assessment evidence.

Unit content

Indicative content is provided for each of the learning outcomes of the unit. The content is neither prescriptive nor exhaustive but should enable achievement of the learning outcomes.

1 Understand factors which inform the design of learning and development activities.

Legislative factors: e.g. health, safety and welfare issues, data protection issues, professional and occupational compliance/training requirements.

Organisational factors: e.g. L&D policy & practice, budgets, organisational structure and culture.

Adult learning principles: related theory (e.g. Knowles, Kolb, Gardner), individual learner differences and learning preferences.

Learner factors: learning needs (e.g. knowledge, skills & behaviour gaps, starting points, desired end points), level of related skills (e.g. ITC), learning preferences, logistics issues (e.g. availability, access to resources). Sources of information: e.g. ILN specifications; stakeholders in the L&D activity: e.g. learners, managers, learner representatives.

2 Know how to devise clear objectives for a learning and development activity.

Clearly stated learning objectives: the importance of clearly stated and agreed learning objectives; definitions of learning objectives and related terms (e.g. learning aims, learning outcomes, assessment criteria); underpinning models and theories (e.g. Mager, Bloom, the NLP approach, current theory); ways of expressing learning objectives.

3 Be able to design an inclusive learning and development activity which address identified learning and development objectives.

Range of training/learning methods: trainer presentation of information, trainer demonstration, knowledge based learner activities (e.g. case studies, exercises, quizzes), skills based activities (e.g. role plays, presentations, practical exercises and skills practise), problem solving activities, group discussions; face-to-face learning, technology based learning, open/distance learning.

Suitability for learning objectives: underpinning theories linking methods to objectives, e.g. Domains of Learning (Bloom); the link between methods and learning objectives;

Selecting and sequencing: how to open and close an L&D activity, how to sequence learning content to assist learning; linking different activities together; gauging time requirements.

Individual learner differences (e.g. different knowledge & skill levels, learning preferences, levels of willingness to participate); ethics and equality in L&D and how to accommodate individual differences; the importance of using a mix of methods and techniques and monitoring individual learning within a group context.

Monitoring and assessment methods: e.g. informal methods (e.g. questions, activities within learning activities), formal methods (e.g. tests, observations); how to monitor individual learning within group activities; definitions of formative and summative assessment;

Learning resources, i.e. resources to be accessed by the learner: e.g. hand-outs, case studies, exercises, workbooks, technology enabled presentation material, videos, podcasts, audio.

4 Be able to specify the learning and development activity in a recognised and useable format.

Typical formats for 'writing up' an L&D activity; essential details to include (e.g. objectives, timings, methods, summary content, resources, evaluation activity). Definitions and clarification of different terms: e.g. training plan, programme outline, session notes, schemes of work.

Unit assessment

To achieve this unit, the evidence the learner presents for assessment must demonstrate that they have met all the learning outcomes and assessment criteria.

Learning outcomes The learner will:	Assessment criteria The learner can:
1 Understand factors which inform the design of learning and development activities.	1.1 Explain legislative and organisational factors which affect the design of learning and development activities. 1.2 Explain adult learning principles which inform the design of learning and development activities. 1.3 Summarise the specific information required about learners in order to design a relevant learning and development activity.
2 Know how to devise clear objectives for a learning and development activity.	2.1 Convert information about learners and learning requirements into clearly stated objectives for a learning and development activity.
3 Be able to design an inclusive learning and development activity which addresses identified objectives.	3.1 Describe a range of learning/training methods and their suitability for different learning objectives. 3.2 Select and sequence learning methods and content to create a learning and development activity which addresses identified objectives and accommodates learner differences. 3.3 Select and include appropriate methods for monitoring learning and for assessing that learning objectives have been met. 3.4 Select learning resources to support the learning and development activity.
4 Be able to specify the learning and development activity in a recognised and useable format.	4.1 Specify the learning and development activity in a recognised format which can be followed by other learning and development practitioners.

Learning resources for unit: 3DES

This section provides suggestions for suitable resources for this unit. The list is indicative only and should not be considered as prescriptive or exhaustive.

Available at: www.cipd.co.uk/journals

Books

- 1 BEEVERS, K. and REA, A. (2016) *Learning and development practice in the workplace. 3rd ed.* London: Chartered Institute of Personnel and Development.
- 2 KNOWLES, M., HOLTEN III, E.F. and SWANSON, R.A. (2015) *The adult learner: the definitive classic in adult education and human resource development.* 8th ed. Abingdon: Routledge.
- 3 STEWART, J. and CURETON, P. (2014) *Designing, delivering and evaluating L&D: essentials for practice.* London: Chartered Institute of Personnel and Development.

Key journals

- 1 Human Resource Development International
Available at: www.cipd.co.uk/journals
- 2 Human Resource Development Quarterly
Available at: www.cipd.co.uk/journals
- 3 International Journal of Training and Development

Online resources

- 1 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Megatrends: the trends shaping work and working lives*. Available at www.cipd.co.uk/cipd-hr-profession/whats-new/megatrends.aspx
- 2 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. A wealth of resources on HR and learning and development. Available at www.cipd.co.uk/hr-resources/a-z
- 3 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Aligning L&D with business objectives [online]*. Podcast 103. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/103-aligning-l-d-business-objectives.aspx> [Accessed 18 April 2016]
- 4 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *Landing transformational change [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/landing-transformational-change_2014.pdf [Accessed 18 April 2016].
- 5 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Landing transformational change [online]*. Podcast 107. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/107-landing-transformational-change.aspx> [Accessed 18 April 2016].
- 6 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT and UNIVERSITY OF BATH. School of Management. (2015) *Landing transformational change: closing the gap between theory and practice [online]*. Research report. London: CIPD. Available at: https://www.cipd.co.uk/binaries/landing-transformation-change_2015-gap-theory-practice.pdf [Accessed 18 April 2016].
- 7 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *L&D: evolving roles, enhancing skills [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/l-d-evolving-roles-enhancing-skills_2015.pdf [Accessed 18 April 2016].
- 8 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *L&D: new challenges, new approaches [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/l-and-d_2014-new-challenges-new-approaches.pdf [Accessed 18 April 2016].
- 9 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Learning and development 2015: annual survey report [online]*. London: CIPD. Available at: http://www.cipd.co.uk/binaries/learning-development_2015.pdf [Accessed 18 April 2016].
- 10 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *Rethinking staff inductions [online]*. Podcast 89. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/89-rethinking-staff-inductions.aspx> [Accessed 18 April 2016].
- 11 OFFICE FOR STANDARDS IN EDUCATION, CHILDREN'S SERVICES AND SKILLS. (2014) *Teaching, learning and assessment in further education and skills - what works and why*. Manchester: OFSTED. Available at: <https://www.gov.uk/government/publications/teaching-learning-and-assessment-in-further-education-and-skills-what-works-and-why> [Accessed 8 April 2016].
- 12 TOWARDS MATURITY. (2015) *Embracing change: improving performance for business, individuals and the L&D Team [online]*. Article. London: Towards Maturity. Available at: <http://www.towardsmaturity.org/article/2015/11/05/embracing-change-improving-performance-benchmark/> [Accessed 18 April 2016].

Websites

- 1 www.ahrd.org
Website of the Academy of Human Resource Development
- 2 <http://c4lpt.co.uk/>
Website of the Centre for Learning & Performance Technologies, a resource site run by a consultant about learning trends, technologies and tools.
- 3 www.cipd.co.uk
Website of the Chartered Institute of Personnel and Development (CIPD)

Delivering Learning and Development Activities

Unit title	Delivering Learning and Development Activities
Level	3*
Credit value	6
Unit code	3DEL
Unit review date	September 2019

*RQF Level 3, comparable to Level 5 in Ireland, Level 6 in Scotland and EQF Level 4

Purpose and aim of unit

Being able to deliver learning activities in a way that gains learner confidence and engages learners is a crucial skill-set for all trainers. This unit takes learners through the essential stages of preparing for and delivering an inclusive and effective L&D activity for a group of learners. It begins with consideration of the practical preparations required to be credible as a trainer, including ensuring own readiness to deliver the activity and the availability of all resources and materials. The unit moves on to explore the concept of a positive learning climate and the range of steps that can be taken by a trainer towards creating and maintaining this. After reviewing a range of different training techniques, methods and resources, the unit requires learners to make effective use of a selection of these within the delivery of a group based L&D activity, ensuring it is both inclusive and addresses identified learning objectives.

This unit is suitable for persons who:

- are aspiring to, or embarking on, a career in L&D
- are already working in the field of L&D and aim to develop their knowledge and skills in relation to delivering L&D activities.

Learning outcomes

On completion of this unit, learners will:

- 1 Be able to prepare for delivery of a learning and development activity.
- 2 Be able to create a positive learning environment.
- 3 Be able to use a range of training techniques, methods and resources to deliver an inclusive learning and development activity, for a group of learners, which meets identified objectives.

Guided learning hours

The guided learning hours for this unit would normally be considered to be 30, with an additional 30 hours of self-directed learning for reading and the preparation of assessment evidence.

Unit content

Indicative content is provided for each of the learning outcomes of the unit. The content is neither prescriptive nor exhaustive but should enable achievement of the learning outcomes.

1 Be able to prepare for delivery of a learning and development activity.

Own capability and readiness: e.g. skills and knowledge in relation to content; how to ensure sufficient familiarity with the intended structure and content of an L&D activity (i.e. the session/activity plan); managing own emotional state and wellness.

Space, equipment and resources: e.g. rooms/areas, IT equipment, presentation equipment, people, training equipment, learning materials, food and drink, facilities.

2 Be able to create a positive learning environment.

Positive learning environment – physical features: e.g. safe and healthy space; inclusive access to rooms, equipment and trainer; attractive and stimulating environment. Psychological features: e.g. learners feel welcome, included and comfortable to participate.

Preparing an environment which is safe, healthy and supports learning: e.g. addressing health & safety issues, creating best room layout for the situation and activity, ensuring all learners can see/access trainer and training equipment, use of visuals, music and other aids to create an attractive and stimulating environment.

Communication and training techniques to put learners at ease: e.g. open friendly communication styles, use of welcome activities and welcoming visuals, ensuring learners have the information they need, using learner names, recognising and responding to learner needs and preferences, encouraging learner participation.

3 Be able to use a range of training techniques, methods and resources to deliver an inclusive learning and development activity, for a group of learners, which meets identified objectives.

Training techniques and methods: e.g. explaining, questioning, presenting, facilitating learner activities (e.g. exercises, case studies, discussions), facilitating skills development (e.g. demonstration, supported practice, role play), facilitating pair, team and/or group activities; setting ground rules; using 'ice-breakers'; managing group dynamics; balancing individual and group needs; handling behavioural or environmental disruptions, summarising learning, activities to consolidate learning and support transfer of learning to the workplace; techniques and methods which are most effective for opening and closing learning sessions.

Training resources, i.e. resources used by the trainer: e.g. visual aids, flipchart, slides, IT equipment, display objectives. *Learning resources,* i.e. resources to be accessed by the learner: e.g. hand-outs, case studies, exercises, workbooks, technology enabled presentation material, videos, podcasts, audio.

Techniques for monitoring learning: (e.g. informal questioning, observation, assessment activities, performance in learning activities and group work); how to monitor individual learning within a group context.

Unit assessment

To achieve this unit, the evidence the learner presents for assessment must demonstrate that they have met all the learning outcomes and assessment criteria.

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Be able to prepare for delivery of a learning and development activity.	1.1 Ensure own capability and readiness to deliver a specific learning and development activity. 1.2 Ensure the availability of space, equipment and resources required for the activity.
2 Be able to create a positive learning environment.	2.1 Explain physical and psychological features of 'a positive learning environment'. 2.2 Prepare a physical environment for learning that is safe and healthy and which supports the learning activity. 2.3 Use communication and training techniques to put learners at ease and help overcome individual barriers to learning.
3 Be able to use a range of training techniques, methods and resources to deliver an inclusive learning and development activity, for a group of learners, which meets identified objectives.	3.1 Use appropriate training techniques and methods to open a learning and development activity. 3.2 Use a range of training techniques and methods to engage learners and address learning objectives. 3.3 Make effective use of training and learning resources to engage learners and address learning objectives. 3.4 Monitor individual learning and learner engagement in the activity, making adjustments where necessary to ensure that the activity is inclusive and addresses learning objectives. 3.5 Use appropriate training techniques and methods to close a learning and development activity.

Learning resources for unit: 3DEL

This section provides suggestions for suitable resources for this unit. The list is indicative only and should not be considered as prescriptive or exhaustive.

Books

- 1 BEEVERS, K. and REA, A. (2016) *Learning and development practice in the workplace*. 3rd ed. London: Chartered Institute of Personnel and Development.
- 2 QUINN, C.N (2014) *Revolutionize learning & development: performance and innovation strategy for the information age*. San Francisco: John Wiley & Sons.
- 3 STEWART, J. and CURETON, P. (2014) *Designing, delivering and evaluating L&D: essentials for practice*. London: Chartered Institute of Personnel and Development.

Key journals

- 1 Human Resource Development International
Available at: www.cipd.co.uk/journals
- 2 Human Resource Development Quarterly
Available at: www.cipd.co.uk/journals
- 3 International Journal of Training and Development
Available at: www.cipd.co.uk/journals

Online resources

- 1 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. *CIPD Megatrends: the trends shaping work and working lives*. Available at www.cipd.co.uk/cipd-hr-profession/whats-new/megatrends.aspx
- 2 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. A wealth of resources on HR and learning and development. Available at www.cipd.co.uk/hr-resources/a-z
- 3 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Aligning L&D with business objectives [online]*. Podcast 103. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/103-aligning-l-d-business-objectives.aspx> [Accessed 18 April 2016]
- 4 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *Landing transformational change [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/landing-transformational-change_2014.pdf [Accessed 18 April 2016].

- 5 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Landing transformational change [online]*. Podcast 107. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/107-landing-transformational-change.aspx> [Accessed 18 April 2016].
- 6 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT and UNIVERSITY OF BATH. School of Management. (2015) *Landing transformational change: closing the gap between theory and practice [online]*. Research report. London: CIPD. Available at: https://www.cipd.co.uk/binaries/landing-transformation-change_2015-gap-theory-practice.pdf [Accessed 18 April 2016].
- 7 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *L&D: evolving roles, enhancing skills [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/l-d-evolving-roles-enhancing-skills_2015.pdf [Accessed 18 April 2016].
- 8 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *L&D: new challenges, new approaches [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/l-and-d_2014-new-challenges-new-approaches.pdf [Accessed 18 April 2016].
- 9 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Learning and development 2015: annual survey report [online]*. London: CIPD. Available at: http://www.cipd.co.uk/binaries/learning-development_2015.pdf [Accessed 18 April 2016].
- 10 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *Rethinking staff inductions [online]*. Podcast 89. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/89-rethinking-staff-inductions.aspx> [Accessed 18 April 2016].
- 11 TOWARDS MATURITY. (2015) *Embracing change: improving performance for business, individuals and the L&D Team [online]*. Article. London: Towards Maturity. Available at: <http://www.towardsmaturity.org/article/2015/11/05/embracing-change-improving-performance-benchmark/> [Accessed 18 April 2016].

Websites

- 1 www.ahrd.org
Website of the Academy of Human Resource Development
- 2 www.cipd.co.uk
Website of the Chartered Institute of Personnel and Development (CIPD)

Evaluating Learning and Development Activities

Unit title	Evaluating Learning and Development Activities
Level	3*
Credit value	3
Unit code	3ELD
Unit review date	September 2019

*RQF Level 3, comparable to Level 5 in Ireland, Level 6 in Scotland and EQF Level 4

Purpose and aim of unit

Evaluating L&D activities completes the training cycle and enables L&D practitioners and managers to ensure that activities meet intended objectives. Without evaluation, weaknesses in L&D activities are likely to be continued, opportunities for improvement missed and valuable time and resources may be wasted. This unit develops learners understanding of the reasons for evaluation and the different approaches that can be taken to evaluating L&D activities. Armed with this understanding, learners are required to determine criteria for evaluating a specific L&D activity and identify the related information to be collected. They will then learn about, design and apply tools for collecting the required information. Finally learners will develop their skills by analysing evaluation information and using different formats to present their findings and recommendations.

This unit is suitable for persons who:

- are aspiring to, or embarking on, a career in L&D
- are already working in the field of L&D and aim to develop their knowledge and skills in relation to evaluating L&D activities.

Learning outcomes

On completion of this unit, learners will:

- 1 Understand the purpose and practice of evaluating learning and development activities.
- 2 Be able to identify and collect information required to evaluate a learning and development activity.
- 3 Be able to analyse evaluation information and present findings and related recommendations.

Guided learning hours

The guided learning hours for this unit would normally be considered to be 15 with an additional 15 hours of self-directed learning for reading and the preparation of assessment evidence.

Unit content

Indicative content is provided for each of the learning outcomes of the unit. The content is neither prescriptive nor exhaustive but should enable achievement of the learning outcomes.

1 Understand the purpose and practice of evaluating learning and development activities.

Definitions of evaluation and comparison with related concepts: e.g. assessment, validation.

Purposes of evaluation: e.g. gauging customer satisfaction; continuous improvement of, for example: learning content, learning design, trainer performance, learning environment and facilities; feedback for organisation, for example: ROI, capabilities data, learning needs data; research purposes; compliance with external regulatory requirements.

Different levels of and approaches to evaluation: levels and scope of evaluation activity; determining objectives/criteria for evaluation; models relating to evaluation of L&D.

Different approaches to evaluation: evaluation methods e.g. group discussions, tests and assessments, use of questionnaires, interviews, e-surveys 'graffiti' boards, observations, focus groups. Timing of evaluation: e.g. pre- and post- evaluation; immediate, short, mid and long term evaluation, and how to determine time scales. Issues of validity, reliability and ethics in evaluation practice.

2 Be able to identify and collect information required to evaluate a learning and development activity.

Evaluation criteria: e.g. improvement in levels of knowledge and skills, relevance of content, performance of trainer, quality of facilities, impact on workplace performance, return on investment, quality of learner experience.

Types of information: e.g. qualitative, quantitative; learner feedback, trainer feedback, opinions and comments from 3rd parties; links between evaluation criteria and the information required. *Collection methods:* how to organise and manage, for example: discussions, assessments, surveys, learner interviews, learner's line-manager interviews.

Tools for collecting information: design issues in relation to, e.g. questionnaires, assessment tools, quizzes, tests, survey forms, interview questions forms, evaluation activity sheets.

3 Be able to analyse evaluation information and present findings and related recommendations.

Analysing evaluation information: e.g. aggregating responses; using scales and scoring; identifying patterns of data; identifying key messages.

Formats for presenting data: formats for presenting quantitative data e.g.: graphs, charts, diagrams and tables; formats for making recommendations; objective reporting versus seeking to influence; understanding the requirements of the recipients of /audience for the information.

Unit assessment

To achieve this unit, the evidence the learner presents for assessment must demonstrate that they have met all the learning outcomes and assessment criteria.

Learning outcomes The learner will:	Assessment criteria The learner can:
1 Understand the purpose and practice of evaluating learning and development activities.	1.1 Explain key reasons for evaluating learning and development activities. 1.2 Explain different levels of, and approaches to, evaluating learning and development activities.
2 Be able to identify and collect information required to evaluate a learning and development activity.	2.1 Determine criteria for evaluating a specific learning and development activity. 2.2 Identify the information required for the evaluation and appropriate collection methods. 2.3 Select and apply tools for collecting evaluation information.
3 Be able to analyse evaluation information and present findings and related recommendations.	3.1 Analyse and draw conclusions from evaluation information. 3.2 Use a range of formats to present evaluation findings and related recommendations.

Learning resources for unit: 3ELD

This section provides suggestions for suitable resources for this unit. The list is indicative only and should not be considered as prescriptive or exhaustive.

Books

- 1 BEEVERS, K. and REA, A. (2016) *Learning and development practice in the workplace*. 3rd ed. London: Chartered Institute of Personnel and Development.
- 2 EVERGREEN, S.D.H. (2014) *Presenting data effectively: communicating your findings for maximum impact*. London: Sage.
- 3 STEWART, J. and CURETON, P. (2014) *Designing, delivering and evaluating L&D: essentials for practice*. London: Chartered Institute of Personnel and Development.

Key journals

- 1 PHILLIPS, J.J. and PHILLIPS, P. (2011) Moving from evidence to proof. *Training and Development*. Vol 65, No 8, August. pp34–39.
- 2 Human Resource Development Quarterly
Available at: www.cipd.co.uk/journals
- 3 International Journal of Training and Development
Available at: www.cipd.co.uk/journals
- 4 European Journal of Training and Development

Online resources

- 1 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. *CIPD Megatrends: the trends shaping work and working lives*. Available at www.cipd.co.uk/cipd-hr-profession/whats-new/megatrends.aspx
- 2 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. A wealth of resources on HR and learning and development. <http://www.cipd.co.uk/hr-resources/a-z/>
- 3 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Aligning L&D with business objectives [online]*. Podcast 103. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/103-aligning-ld-business-objectives.aspx> [Accessed 18 April 2016]
- 4 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *Landing transformational change [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/landing-transformational-change_2014.pdf [Accessed 18 April 2016].

- 5 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Landing transformational change [online]*. Podcast 107. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/107-landing-transformational-change.aspx> [Accessed 18 April 2016].
- 6 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT and UNIVERSITY OF BATH. School of Management. (2015) *Landing transformational change: closing the gap between theory and practice [online]*. Research report. London: CIPD. Available at: https://www.cipd.co.uk/binaries/landing-transformation-change_2015-gap-theory-practice.pdf [Accessed 18 April 2016].
- 7 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *L&D: evolving roles, enhancing skills [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/l-d-evolving-roles-enhancing-skills_2015.pdf [Accessed 18 April 2016].
- 8 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *L&D: new challenges, new approaches [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/l-and-d_2014-new-challenges-new-approaches.pdf [Accessed 18 April 2016].
- 9 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Learning and development 2015: annual survey report [online]*. London: CIPD. Available at: http://www.cipd.co.uk/binaries/learning-development_2015.pdf [Accessed 18 April 2016].
- 10 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *Rethinking staff inductions [online]*. Podcast 89. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/89-rethinking-staff-inductions.aspx> [Accessed 18 April 2016].
- 11 RAE, L. and CHAPMAN, A. (2013) *Training programme evaluation [online]*. Resource. [Leicester]: Businessballs.com.<http://www.businessballs.com/trainingprogramevaluation.htm> [Accessed 11 April 2016].
- 12 SUCKLEY, L. (2014) *How to measure the ROI for training and development programmes [online]*. Inspiring the workforce blog. Sheffield: Sheffield Hallam University. Available at: <http://extra.shu.ac.uk/sbsblog/2014/02/how-to-measure-the-roi-of-training-and-development-programmes/> [Accessed 11 April 2016].
- 13 TOWARDS MATURITY. (2015) *Embracing change: improving performance for business, individuals and the L&D Team [online]*. Article. London: Towards Maturity. Available at: <http://www.towardsmaturity.org/article/2015/11/05/embracing-change-improving-performance-benchmark/> [Accessed 18 April 2016].

Websites

- 1 www.ahrd.org
Website of the Academy of Human Resource Development
- 2 www.cipd.co.uk
Website of the Chartered Institute of Personnel and Development (CIPD)
- 3 <http://managementhelp.org/training/systematic/ROI-evaluating-training.htm>
An online integrated library for personal, professional and organisational development
- 4 <https://www.td.org/Publications/Blogs/L-and-D-Blog>
Learning and development blog from the Association of Talent Development
- 5 www.ufhrd.co.uk
Website of the University Forum for Human Resource Development

Using Technology to Facilitate Learning

Unit title	Using Technology to Facilitate Learning
Level	3*
Credit value	6
Unit code	3TFL
Unit review date	September 2019

*RQF Level 3, comparable to Level 5 in Ireland, Level 6 in Scotland and EQF Level 4

Purpose and aim of unit

Whether used alone or as part of a blended solution, technology is now a component of most learning and development (L&D) programmes, and the ability to use technology effectively has become a key skill set for trainers. This unit aims to develop learners' awareness, expertise and confidence in this area so that they can respond appropriately to different requirements and provide a wide range of L&D activities. The unit begins with an exploration of some key ways technology is used for facilitating learning, and the potential advantages and disadvantages of each. The unit then focusses on the delivery of live online learning sessions, requiring learners to investigate the technology and processes which enable these and the specific trainer activities and skills involved. Finally the unit looks at different types of digital learning content and the factors that make it effective. Having evaluated different examples, learners are required to create their own digital content, ensuring that it is both engaging and likely to achieve its learning objectives.

This unit is suitable for persons who:

- are aspiring to, or embarking on, a career in L&D
- are already working in the field of L&D and wish to develop their knowledge and skills in relation to learning technologies.

Learning outcomes

On completion of this unit, learners will:

- 1 Understand different ways of using technology to facilitate learning.
- 2 Know how to deliver a live online learning session.
- 3 Understand and be able to create digital learning content.

Guided learning hours

The guided learning hours for this unit would normally be considered to be 30 hours, with an additional 30 hours of self-directed learning for reading and the preparation of assessment evidence.

Unit content

Indicative content is provided for each of the learning outcomes of the unit. The content is neither prescriptive nor exhaustive but should enable achievement of the learning outcomes.

1 Understand different ways of using technology to facilitate learning.

Learners should have the opportunity to experience different technologies.

A range of current ways of using technology to facilitate learning: e.g. e-learning materials; live online learning sessions/virtual classrooms/webinars; online discussion forums; smart phones and learning related apps; social media; learning management systems; e-portfolios. A brief history of the use of technology in L&D, a review of current trends, and an exploration of newly emerging uses.

Potential advantages and disadvantages: in relation to, for example: learning effectiveness, flexibility, accessibility, scalability, time efficiency and cost efficiency.

2 Know how to deliver a live online learning session.

Currently available systems and software for developing, delivering and accessing live online sessions; available capabilities and facilities; technical processes involved from design to delivery; characteristics of effective virtual sessions.

Different trainer activities and skills required – e.g. in relation to: ITC skills (making effective use of the software), remote delivery and facilitation skills, managing live discussions and activities remotely; preparation and follow up activities.

3 Understand and be able to create digital learning content.

The definition of digital learning content; different forms and features of (e.g. text and interactive text, videos, slideshows, screencasts, podcasts, learning tutorials, apps, simulations, scenarios, games); design issues in relation to different forms; additional features, such as facilities for monitoring or measuring learner progress; factors which make content engaging and likely to achieve its objectives; the role of the content curator.

Unit assessment

To achieve this unit, the evidence the learner presents for assessment must demonstrate that they have met all the learning outcomes and assessment criteria.

Learning outcomes The learner will:	Assessment criteria The learner can:
1 Understand different ways of using technology to facilitate learning.	1.1 Identify different ways technology can be used to facilitate learning. 1.2 Explain the potential advantages and disadvantages of different ways of using technology to facilitate learning.
2 Know how to deliver a live online learning session.	2.1 Describe the typical software and processes involved in providing a live online learning activity. 2.2 Analyse how delivery of a live online learning session differs from delivering a face-to-face session, in terms of trainer activities and skill requirements.
3 Understand and be able to create digital learning content.	3.1 Explain the term 'digital learning content' and describe different types. 3.2 Evaluate examples of digital learning content in relation to how engaging they are and how likely they are to achieve their objective. 3.3 Create digital learning content that is engaging and likely to achieve its learning objective(s).

Learning resources for unit: 3TFL

This section provides suggestions for suitable resources for this unit. The list is indicative only and should not be considered as prescriptive or exhaustive.

Books

- 1 BEEVERS, K. and REA, A. (2016) *Learning and development practice in the workplace*. 3rd ed. London: Chartered Institute of Personnel and Development.
- 2 ALLEN, M. (2016) *Michael Allen's guide to e-learning: building interactive, fun, and effective learning programs for any company*. Hoboken: John Wiley.
- 3 HOFFMAN, J. (2004) *Live and online: tips, techniques, and ready-to-use activities for the virtual classroom*. San Francisco: Pfeiffer.
- 4 HUBBARD, R. (2013) *The really useful e-learning instruction manual*. Chichester: John Wiley & Sons.
- 5 SHANK, P. (ed.) (2011) *The online learning idea book: Volume 2: proven ways to enhance technology-based and blended learning*. San Francisco: Pfeiffer.
- 6 SHEPHERD, C. (2012) *Digital learning content: a designer's guide*. Chesterfield: Onlignment.
- 7 SHEPHERD, C., GREEN, P. and SAMPSON, B. (2011) *Live online learning: a facilitator's guide*: Chestfield: Onlignment.

Key journals

- 1 Human Resource Development Quarterly
Available at: www.cipd.co.uk/journals
- 2 International Journal of Training and Development
Available at: www.cipd.co.uk/journals
- 3 European Journal of Training and Development

Online resources

- 1 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. CIPD *Megatrends: the trends shaping work and working lives*. Available at www.cipd.co.uk/cipd-hr-profession/whats-new/megatrends.aspx
- 2 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. A wealth of resources on HR and learning and development. Available at www.cipd.co.uk/hr-resources/a-z
- 3 BOROVVOY, A.E. (2014) *5-minute film festival: the basics of blended learning [online]*. Blog and video. [-]: edutopia. Available at: <http://www.edutopia.org/blog/film-festival-blended-learning-resources> [Accessed 13 April 2016].
- 4 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Aligning L&D with business objectives [online]*. Podcast 103. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/103-aligning-l-d-business-objectives.aspx> [Accessed 18 April 2016]
- 5 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *Landing transformational change [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/landing-transformational-change_2014.pdf [Accessed 18 April 2016].

- 6 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Landing transformational change [online]*. Podcast 107. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/107-landing-transformational-change.aspx> [Accessed 18 April 2016].
- 7 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT and UNIVERSITY OF BATH. School of Management. (2015) *Landing transformational change: closing the gap between theory and practice [online]*. Research report. London: CIPD. Available at: https://www.cipd.co.uk/binaries/landing-transformation-change_2015-gap-theory-practice.pdf [Accessed 18 April 2016].
- 8 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *L&D: evolving roles, enhancing skills [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/l-d-evolving-roles-enhancing-skills_2015.pdf [Accessed 18 April 2016].
- 9 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *L&D: new challenges, new approaches [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/l-and-d_2014-new-challenges-new-approaches.pdf [Accessed 18 April 2016].
- 10 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Learning and development 2015: annual survey report [online]*. London: CIPD. Available at: http://www.cipd.co.uk/binaries/learning-development_2015.pdf [Accessed 18 April 2016].
- 11 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *Rethinking staff inductions [online]*. Podcast 89. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/89-rethinking-staff-inductions.aspx> [Accessed 18 April 2016].
- 12 INTEL CORPORATION. (2012) *Blended learning toolkit [online]*. Resource. Santa Clara, CA: Intel. Available at: http://www.intel.com/education/video/blend/resources/11_blended_learning_toolkit.pdf [Accessed 13 April 2016].
- 13 TOWARDS MATURITY. (2015) *Embracing change: improving performance for business, individuals and the L&D Team [online]*. Article. London: Towards Maturity. Available at: <http://www.towardsmaturity.org/article/2015/11/05/embracing-change-improving-performance-benchmark/> [Accessed 18 April 2016].

Websites

- 1 www.ahrd.org
Website of the Academy of Human Resource Development
- 2 <http://blogs.articulate.com/rapid-elearning/>
Website of the Rapid E-Learning Blog.
- 3 www.cipd.co.uk
Website of the Chartered Institute of Personnel and Development (CIPD)
- 4 <http://elearningindustry.com/>
Website of the largest online community of professionals involved in the eLearning industry, offers articles, resources and software
- 5 <http://info.alleninteractions.com/>
Website of Michael Allen's e-learning leadership blog (which includes the topic of blended learning).
- 6 <http://onlignment.com>
Website of Clive Shepherd, specialist in blended learning

Enhancing Learner Engagement

Unit title	Enhancing Learner Engagement
Level	3*
Credit value	6
Unit code	3ELE
Unit review date	September 2019

*RQF Level 3, comparable to Level 5 in Ireland, Level 6 in Scotland and EQF Level 4

Purpose and aim of unit

Learning and development (L&D) interventions can only have the desired impact if the learner(s) they are aimed at choose to engage with them. L&D practitioners have long looked to psychology, and more recently to brain and neuroscience for information, methods and techniques which will help them to make learning activities engaging and effective for all participants. This unit builds on some of the areas introduced in core units by looking in greater depth at the concept of learner engagement and some of the factors which impact on it. The unit explores the psychological background to L&D and particular psychology-based strategies that have been adopted by L&D practitioners, as well as the potential impact of findings emerging from brain and neuroscience. To ensure learners are aware of good practice in these areas, they will also learn about the ethical aspects of using psychology and neuroscience to underpin L&D. Finally learners are required to recommend a range of engagement strategies for different stages of the training cycle and to apply some of these within their L&D practice.

This unit is suitable for persons who:

- are working in or are seeking to develop a career in L&D.
- aim to further their understanding of how the science of psychology has provided a theoretical basis for their practice.
- aim to further their expertise in enhancing participant engagement in the learning process.

Learning outcomes

On completion of this unit, learners will:

- 1 Understand factors which affect learner engagement.
- 2 Understand how psychology and neuroscience can inform strategies to engage learners.
- 3 Be able to select, apply and monitor strategies to enhance learner engagement.

Guided learning hours

The guided learning hours for this unit would normally be considered to be 30, with an additional 30 hours of self-directed learning for reading and the preparation of assessment evidence.

Unit content

Indicative content is provided for each of the learning outcomes of the unit. The content is neither prescriptive nor exhaustive but should enable achievement of the learning outcomes.

1 Understand factors which affect learner engagement.

Definitions and explanations of learner engagement, e.g. learners recognising the value and relevance of learning, being fully motivated to participate, 'attending' and actively participating in L&D, taking responsibility for own learning, fulfilling L&D & qualification requirements, honouring commitments in a timely and effective manner. Engagement as a co-operative endeavour between trainer and learner.

Reasons for non-engagement, e.g. reasons to do with self-image, self-beliefs and learning history; reasons relating to perceived lack of relevance to work and/or work aspirations; reasons relating to appropriateness of learning to learners needs, level and preferences; boring, repetitive and uninspiring learning design and delivery; logistical factors.

2 Understand how psychology and neuroscience can inform strategies to engage learners.

Overview of different schools and approaches in psychology e.g. educational psychology, social psychology, clinical psychology; functionalism, behaviourism, cognitive psychology, humanistic psychology, positive psychology; particular aspects of psychology which have been integrated into L&D practice (e.g. principles of adult learning; explanations/representations of learning processes; theories relating to memory and assimilation, domains of learning and modes of knowledge acquisition; theories/studies relating to effectiveness of different types of learning (e.g. experiential learning, active learning, engaging all senses); theories and models relating to individualisation/differentiation of learning to meet different learner styles, levels and preference; theories and models relating to motivation, theories of group behaviour and dynamics); explanations and practical examples of how aspects of psychology have been used to inform L&D for the purpose of enhancing learner engagement.

An overview of current themes in neuroscience which relate to learning and learner engagement; current brain-science findings and functions of different parts of the brain; e.g. studies relating to brain plasticity, memory, knowledge acquisition, motivation. An exploration of how neuroscience can inform L&D practice, particularly in relation to learner motivation and engagement.

Ethics: e.g. stability and validity (or not) of the science, pseudo-psychology and 'neuromyths'; appropriateness for learner groups, competence of trainer, licensing and qualifications (where appropriate); implications of misuse of psychology based materials (e.g. profiling assessments and questionnaires/activities which can inaccurately 'label' learners).

3 Be able to select, apply and monitor strategies to enhance learner engagement.

Enhancing learner engagement at each stage of the training cycle i.e. enabling and engaging learners in identifying their own learning needs, informing selection of their own L&D activities, participating fully in activities and contributing to the evaluation of activities.

Strategies to engage: e.g. identifying causes of disengagement; enabling learners to overcome personal barriers; enabling learners to see relevance of learning activities; involving other stakeholders; agreeing 'learning contracts'; using a variety of learning methods; creative and exciting approaches to learning design and delivery; age and culturally appropriate learning design; identifying best ways of motivating learner(s); creating the right mixture of security and stimulus.

Unit assessment

To achieve this unit, the evidence the learner presents for assessment must demonstrate that they have met all the learning outcomes and assessment criteria.

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Understand factors which affect learner engagement.	1.1 Explain the concept and advantages of 'learner engagement'. 1.2 Explain reasons why learners might not engage in learning and development activities.
2 Understand how psychology and neuroscience can inform strategies to engage learners.	2.1 Assess how aspects of educational or social psychology have informed approaches to engage learners. 2.2 Explain how aspects of neuroscience, relating to learning and learner motivation, can inform strategies to engage learners. 2.3 Discuss ethical factors relating to the use of psychology and neuroscience-based models, theories or materials, to enhance learner engagement.
3 Be able to select, apply and monitor strategies to enhance learner engagement.	3.1 Recommend strategies for engaging learners at each stage of the training cycle. 3.2 Select and apply strategies for enhancing learner engagement. 3.3 Monitor the application and effectiveness of selected strategies.

Learning resources for unit: 3ELE

This section provides suggestions for suitable resources for this unit. The list is indicative only and should not be considered as prescriptive or exhaustive.

Books

- 1 BEEVERS, K. and REA, A. (2016) *Learning and development practice in the workplace*. 3rd ed. London: Chartered Institute of Personnel and Development.
- 2 COLLINS, S. (2015) *Neuroscience for learning and development: how to apply neuroscience and psychology for improved learning and training*. London: Kogan Page.
- 3 DIRKSEN, J. (2015) *Design for how people learn*. 2nd ed. Berkeley, CA: New Riders.
- 4 NOLEN-HOEKSEMA, S., FREDRICKSON, B.L., LOFTUS, G.R. and LUTZ, C. (2014) *Atkinson & Hilgard's Introduction to psychology*. 16th ed. Andover: Cengage Learning EMEA.
- 5 PINK, D. H. (2011) *Drive: the surprising truth about what motivates us*. Edinburgh: Canongate Books.
- 6 TUCKMAN, B. W. and MONETTI, D. M. (2011) *Educational psychology*. [Belmont, CA]: Wadsworth.

Online resources

- 1 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Aligning L&D with business objectives [online]*. Podcast 103. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/103-aligning-l-d-business-objectives.aspx> [Accessed 18 April 2016]
- 2 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *Landing transformational change [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/landing-transformational-change_2014.pdf [Accessed 18 April 2016].
- 3 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Landing transformational change [online]*. Podcast 107. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/107-landing-transformational-change.aspx> [Accessed 18 April 2016].

- 4 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT and UNIVERSITY OF BATH. School of Management. (2015) *Landing transformational change: closing the gap between theory and practice [online]*. Research report. London: CIPD. Available at: https://www.cipd.co.uk/binaries/landing-transformation-change_2015-gap-theory-practice.pdf [Accessed 18 April 2016].
- 5 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *L&D: evolving roles, enhancing skills [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/l-d-evolving-roles-enhancing-skills_2015.pdf [Accessed 18 April 2016].
- 6 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *L&D: new challenges, new approaches [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/l-and-d_2014-new-challenges-new-approaches.pdf [Accessed 18 April 2016].
- 7 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Learning and development 2015: annual survey report [online]*. London: CIPD. Available at: http://www.cipd.co.uk/binaries/learning-development_2015.pdf [Accessed 18 April 2016].
- 8 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2013) *Neuroscience and its impact on people development*. Podcast. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/neuroscience.aspx> [Accessed 11 April 2016].
- 9 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *Neuroscience and learning: fresh thinking in learning and development [online]*. Research report. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/research/neuroscience-learning.aspx> [Accessed 11 April 2016].
- 10 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *Neuroscience in action: applying insight to L&D practice [online]*. Research report. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/research/neuroscience-action.aspx> [Accessed 11 April 2016].
- 11 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *Rethinking staff inductions [online]*. Podcast 89. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/89-rethinking-staff-inductions.aspx> [Accessed 18 April 2016].
- 12 HENDEL-GILLER, R. et al (2010) *The neuroscience of learning: a new paradigm for corporate education [online]*. White paper. [-]: Maritz Institute. Available at: <http://www.themaritzinstitute.com/our-library/reports-white-papers-archive> [Accessed 11 April 2016].
- 13 PAPPAS, C. (2014) *11 tips to engage and inspire adult learners [online]*. Article. [-]: eLearning Industry. Available at: <http://elearningindustry.com/11-tips-engage-inspire-adult-learners> [Accessed 11 April 2016].
- 14 TOWARDS MATURITY. (2015) *Embracing change: improving performance for business, individuals and the L&D Team [online]*. Article. London: Towards Maturity. Available at: <http://www.towardsmaturity.org/article/2015/11/05/embracing-change-improving-performance-benchmark/> [Accessed 18 April 2016].
- 15 VORHAUSER-SMITH, S. (2011) *The neuroscience of learning and development: crystallising potential [online]*. [-]: PageUp People. Available at: <http://www.pageuppeople.com/wp-content/uploads/2012/06/Neuroscience-of-Learning-and-Development1.pdf> [Accessed 11 April 2016].

Websites

- 1 www.ahrd.org
Website of the Academy of Human Resource Development
- 2 http://blog.cengage.com/top_blog/five-ways-to-engage-adult-learners/
Blog from Cengage Learning
- 3 www.cipd.co.uk
Website of the Chartered Institute of Personnel and Development (CIPD)
- 4 <http://www.themaritzinstitute.com/>
Website of the Maritz Institute, which also has videos, a YouTube channel, a Linked-In group and a twitter feed.

Supporting Collective and Social Learning

Unit title	Supporting Collective and Social Learning
Level	3*
Credit value	6
Unit code	3SCL
Unit review date	September 2019

*RQF Level 3, comparable to Level 5 in Ireland, Level 6 in Scotland and EQF Level 4

Purpose and aim of unit

Human beings have always learned by, and from, interacting with each other. As new technologies rapidly expand the reach and frequency of interaction, so opportunities for learning are increased. This unit introduces learners to the concepts of collective and social learning and the different ways these can take place. The unit looks particularly at how the specific technologies of e-learning programmes (with online discussion elements) and social media are impacting on collective and social learning – and correspondingly on the roles and required skill sets of L&D professionals. Having built the learners' knowledge in these areas, the unit requires them to both facilitate an online discussion and to use a form of social media to support learning within an L&D activity.

This unit is suitable for persons who:

- are aspiring to, or embarking on, a career in L&D
- are already working in the field of L&D and aim to develop their knowledge and skills in relation to facilitating technology-based collective and social learning.

Learning outcomes

On completion of this unit, learners will:

- 1 Understand the concepts and evolving practices of collective and social learning.
- 2 Be able to facilitate collective and social learning within an e-learning programme.
- 3 Be able to use social media to support collective and social learning.

Guided learning hours

The guided learning hours for this unit would normally be considered to be 30, with an additional 30 hours of self-directed learning for reading and the preparation of assessment evidence.

Unit content

Indicative content is provided for each of the learning outcomes of the unit. The content is neither prescriptive nor exhaustive but should enable achievement of the learning outcomes.

1 Understand the concepts and evolving practices of collective and social learning.

Concepts of collective and social learning: A review of definitions of each concept; definitions of similar concepts (e.g. collaborative learning, co-operative learning, group or team learning) and how all of these fit together under collective and social learning; how individual learning theory informs our understanding of collective and social learning; a brief history of collective and social learning; examples of formal (planned, deliberate) and informal (accidental, naturally occurring) types of collective and social learning.

E-learning programmes: Definitions; different types and examples of e-learning programmes; the main collective and social learning aspects of e-learning programmes (e.g. live chat rooms, discussion forums, discussion boards); differences between synchronous and asynchronous learner discussions.

Social media: Definitions and examples (e.g. Facebook, YouTube, Twitter, LinkedIn, Google+, etc.); brief history/overview of social media and its impact on collective and social learning.

2 Be able to facilitate collective and social learning within an e-learning programme

E-learning programmes: definitions and examples; typical components.

The role of the e-learning tutor: activities involved in supporting e-learning programmes; the trainer's particular role in supporting collective and social learning within e-learning programmes; the skills required to facilitate and moderate online discussions; good practice tips and techniques for effective facilitation of online discussions.

3 Be able to use social media to support collective and social learning.

Social Media: examples of currently available platforms (e.g. see above); features of different platforms, different user groups and communities, their use and relevance to collective and social learning.

Use social media to support collective and social learning: strategies for using social media within learning activities; examples of different L&D activities and programmes which make use of social media; factors affecting choice of social media for an L&D activity.

Evaluating use of social media: selection and inclusion of specific evaluation criteria to reflect a social media based activity (e.g. ease of use, access to essential technology, user preference over other methods, user engagement, ability to monitor learner efforts and progress).

Unit assessment

To achieve this unit, the evidence the learner presents for assessment must demonstrate that they have met all the learning outcomes and assessment criteria.

Learning outcomes The learner will:	Assessment criteria The learner can:
1 Understand the concepts and evolving practices of collective and social learning.	1.1 Explain the concepts of collective and social learning. 1.2 Describe formal and informal types of collective and social learning. 1.3 Evaluate how e-learning programmes and social media are impacting on collective and social learning.
2 Be able to facilitate collective and social learning within an e-learning programme.	2.1 Analyse the role of the e-learning tutor in facilitating and maximising collective and social learning. 2.2 Facilitate an on-line discussion within an e-learning programme.
3 Be able to use social media to support collective and social learning.	3.1 Compare and contrast currently available social media platforms. 3.2 Select and use social media to support collective and social learning within an L&D activity. 3.3 Justify choice of social media and evaluate its effectiveness in supporting collective and social learning.

Learning resources for unit: 3SCL

This section provides suggestions for suitable resources for this unit. The list is indicative only and should not be considered as prescriptive or exhaustive.

Books

- 1 BEEVERS, K. and REA, A. (2016) *Learning and development practice in the workplace*. 3rd ed. London: Chartered Institute of Personnel and Development.
- 2 HART, J. and JARCHE, H. (2014) *Social learning handbook: the next generation of learning practices in the age of knowledge sharing and collaboration*. England: Lulu.com. Available from: <http://janehart.com/writing-2/books/social-learning-handbook/>
- 3 ILLERIS, K. (2011) *The fundamentals of workplace learning: understanding how people learn in working life*. Abingdon: Routledge.
- 4 QUINN, C.N (2014) *Revolutionize learning & development: performance and innovation strategy for the information age*. San Francisco: John Wiley & Sons.

Key journals

- 1 Human Resource Development Quarterly
Available at: www.cipd.co.uk/journals
- 2 International Journal of Training and Development
Available at: www.cipd.co.uk/journals
- 3 SAMBROOK, S.A. (2003) E-learning in small organisations. *Education and Training*. Vol 45, No 8/9. pp.506–16.

Online resources

- 1 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. CIPD Megatrends: the trends shaping work and working lives. Available at www.cipd.co.uk/cipd-hr-profession/whats-new/megatrends.aspx
- 2 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. A wealth of resources on HR and learning and development. Available at www.cipd.co.uk/hr-resources/a-z
- 3 BOZARTH, J. (2012) *From traditional instruction to instructional design 2.0 [online]*. Blog and podcast. Alexandria, VA: Association for Talent Development. Available at: <https://www.td.org/Publications/Magazines/TD/TD-Archive/2012/03/Instruction-Design-2> [Accessed 12 April 2016].
- 4 BRIGGS, S. (2015) *Social learning is more than just social media: crafting an effective strategy [online]*. Informed blog. Sydney: Open Colleges. Available at: <http://www.opencolleges.edu.au/informed/features/social-learning/> [Accessed 13 April 2016].
- 5 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Aligning L&D with business objectives [online]*. Podcast 103. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/103-aligning-ld-business-objectives.aspx> [Accessed 18 April 2016]

- 6 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *Landing transformational change [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/landing-transformational-change_2014.pdf [Accessed 18 April 2016].
- 7 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Landing transformational change [online]*. Podcast 107. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/107-landing-transformational-change.aspx> [Accessed 18 April 2016].
- 8 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT and UNIVERSITY OF BATH. School of Management. (2015) *Landing transformational change: closing the gap between theory and practice [online]*. Research report. London: CIPD. Available at: https://www.cipd.co.uk/binaries/landing-transformation-change_2015-gap-theory-practice.pdf [Accessed 18 April 2016].
- 9 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *L&D: evolving roles, enhancing skills [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/l-d-evolving-roles-enhancing-skills_2015.pdf [Accessed 18 April 2016].
- 10 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *L&D: new challenges, new approaches [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/l-and-d_2014-new-challenges-new-approaches.pdf [Accessed 18 April 2016].
- 11 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Learning and development 2015: annual survey report [online]*. London: CIPD. Available at: http://www.cipd.co.uk/binaries/learning-development_2015.pdf [Accessed 18 April 2016].
- 12 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *Rethinking staff inductions [online]*. Podcast 89. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/89-rethinking-staff-inductions.aspx> [Accessed 18 April 2016].
- 13 JARCHE, H. (2011) *Social learning, complexity and the enterprise [online]*. Article. New Brunswick: jarche.com. Available at: <http://jarche.com/2011/04/social-learning-complexity-and-the-enterprise/> [Accessed 12 April 2016].
- 14 LAUBY, S. (2013) *Why social learning benefits your business [online]*. Blog. [-]: Mashable UK. Available at: <http://mashable.com/2012/05/19/social-learning/#EanUAm.UgZqH> [Accessed 12 April 2016].
- 15 MCGRAW HILL EDUCATION (2015) *How social media can help students study [online]*. Blog. Columbus, OH: McGraw Hill Education. Available at: <https://www.mheducation.com/blog/thought-leadership/how-social-media-can-help-students-study.html> [Accessed 12 April 2016].
- 16 SHANK, P. (2012) *eLearning Guild's research: what are the benefits of social learning? [online]*. Blog. Sydney: Open Colleges. Available at: <http://www.opencolleges.edu.au/informed/features/social-learning/> [Accessed 12 April 2016].
- 17 TOWARDS MATURITY. (2015) *Embracing change: improving performance for business, individuals and the L&D Team [online]*. Article. London: Towards Maturity. Available at: <http://www.towardsmaturity.org/article/2015/11/05/embracing-change-improving-performance-benchmark/> [Accessed 18 April 2016].
- 18 WENGER-TRAYNER, E. and WENGER-TRAYNER, B. (2015) *Introduction to communities of practice: a brief overview of the concept and its uses [online]*. Publication. Version 5. Grass Valley, CA: wenger-trayner.com. Available at: <http://wenger-trayner.com/introduction-to-communities-of-practice/> [Accessed 12 April 2016].
- 19 YAP, R. and ROBBEN, J. (2010) *A model for leveraging social learning technologies in corporate environments [online]*. Conference paper. Available at: <http://www.lancaster.ac.uk/fss/organisations/netlc/past/nlc2010/abstracts/PDFs/Yap.pdf> [Accessed 12 April 2016].

Websites

- 1 www.ahrd.org
Website of the Academy of Human Resource Development
- 2 <http://www.c4lpt.co.uk/blog/>
Website of 'Learning in the modern social workplace', a blog run by Jane Hart
- 3 www.cipd.co.uk
Website of the Chartered Institute of Personnel and Development (CIPD)
- 4 <http://littlebylittlejohn.com/tag/collective-learning/>
Website of a Professor of Learning Technology and Academic Director of Learning and Teaching at the Open University, features a range of resources on collective learning

Supporting Individual Learning through Coaching and Mentoring

Unit title	Supporting Individual Learning through Coaching and Mentoring
Level	3*
Credit value	6
Unit code	3LCM
Unit review date	September 2019

*RQF Level 3, comparable to Level 5 in Ireland, Level 6 in Scotland and EQF Level 4

Purpose and aim of unit

Research informs us that formal learning events are only part of an effective L&D strategy. Of equal importance are more informal learning opportunities, in the workplace, often supported through a coaching or mentoring relationship. This unit enables L&D professionals to develop the knowledge and skills required to be able to provide basic coaching and mentoring support themselves, as well as being able to support line-managers in coaching and mentoring team members. The unit begins with an introduction to the nature, purpose and practice of both coaching and mentoring, including the potential benefits to be gained by both parties. It continues with a practical exploration of some models and techniques and requires learners to demonstrate these within a coaching or mentoring conversation. Finally learners will consider how, and the extent to which, coaching and mentoring activity should be recorded and effective formats for doing this.

This unit is suitable for persons who:

- are aspiring to, or embarking on, a career in L&D
- are already working in the field of L&D and aim to develop their knowledge and skills in relation to delivering L&D activities.

Learning outcomes

On completion of this unit, learners will:

- 1 Understand the nature, purpose and practice of coaching.
- 2 Understand the nature, purpose and practice of mentoring.
- 3 Be able to use coaching and mentoring models and techniques to support individual learning.
- 4 Know how to record coaching and mentoring activity.

Guided learning hours

The guided learning hours for this unit would normally be considered to be 30, with an additional 30 hours of self-directed learning for reading and the preparation of assessment evidence.

Unit content

Indicative content is provided for each of the learning outcomes of the unit. The content is neither prescriptive nor exhaustive but should enable achievement of the learning outcomes.

1 Understand the nature, purpose and practice of coaching.

Definitions of coaching; difference between coaching and mentoring and coaching and other interventions, for example, 1:1 training; counselling; professional and ethical considerations.

Different types and styles of coaching: different types e.g. executive coaching, performance coaching, skills coaching; different styles e.g. directive & non-directive.

Stages in the one-to-one coaching process: theory/models of the coaching process; descriptions of typical stages in a coaching process; definitions of roles of coach and coachee, linked to each stage in the process.

Benefits for each party - coach: e.g. learning from coaching, personal satisfaction.

Benefits for coachee: e.g. achievement of goals, enhanced capabilities, enhanced motivation and engagement.

2 Understand the nature, purpose and practice of mentoring.

Definitions of mentoring and the nature of the mentoring relationship: e.g. supporting personal and professional development through support, advice and guidance from a more experienced colleague; other examples: e.g. peer mentoring, online mentoring.

The role of the mentor in the mentoring relationship: for example providing specialist guidance, support and advice.

Different mentoring styles: for example developmental, sponsoring, stretching, directive, nurturing, non-directive approaches.

Potential benefits for each party: e.g. mentor – learning benefits, personal satisfaction benefits; mentee – increased confidence and self-awareness; ability to develop action plans based on criteria.

3 Be able to use coaching and mentoring models and techniques to support individual learning.

Coaching and mentoring models and techniques: models e.g. GROW, COACH; techniques e.g. preparing the physical environment; using effective communication skills (e.g. active listening); action planning and goal setting (e.g. SMART objectives, well-formed objectives); effective feedback skills; facilitating reflection and self-assessment.

4 Know how to record coaching and mentoring activity.

Debates around whether activity should be recorded, to what extent and who by; formats for recording aspects (e.g. agreed actions and resulting outcomes) of coaching and mentoring activity.

Unit assessment

To achieve this unit, the evidence the learner presents for assessment must demonstrate that they have met all the learning outcomes and assessment criteria.

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Understand the nature, purpose and practice of coaching.	1.1 Explain the concept of coaching and how it differs from mentoring and other learning and development methods. 1.2 Identify and explain different types and styles of coaching. 1.3 Analyse the stages in a one-to-one coaching process, and the roles of coach and coachee. 1.4 Identify the potential benefits of coaching for coach, and coachee.
2 Understand the nature, purpose and practice of mentoring.	2.1 Explain the concept of mentoring and the nature of the relationship between mentor and mentee. 2.2 Describe a typical mentoring process and roles of mentor and mentee. 2.3 Identify the potential benefits of mentoring for mentor and mentee.
3 Be able to use coaching and mentoring models and techniques to support individual learning.	3.1 Explain models and techniques used in coaching and mentoring and how these can support individual learning. 3.2 Demonstrate the use of models and techniques within a coaching or mentoring conversation.
4 Know how to record coaching and mentoring activity.	4.1 Use an appropriate format to record outcomes and agreed actions resulting from a coaching or mentoring conversation.

Learning resources for unit: 3LCM

This section provides suggestions for suitable resources for this unit. The list is indicative only and should not be considered as prescriptive or exhaustive.

Books

- 1 BEEVERS, K. and REA, A. (2016) *Learning and development practice in the workplace*. 3rd ed. London: Chartered Institute of Personnel and Development.
- 2 CLUTTERBUCK, D. (2014) *Everyone needs a mentor*. 5th ed. London: Chartered Institute of Personnel and Development.
- 3 CLUTTERBUCK, D. MEGGINSON, D. and BAJER, A. (2016) *Building and sustaining a coaching culture*. London: Chartered Institute of Personnel and Development.
- 4 CONNOR, M.P. and POKORA, J.B. (2012) *Coaching and mentoring at work: developing effective practice*. 2nd ed. Maidenhead: Open University Press.
- 5 DOWNEY, M. (2014) *Effective modern coaching: the principles and art of successful business coaching*. London: LID Publishing.
- 6 FLAHERTY, J. (2010) *Coaching: evoking excellence in others*. 3rd ed. Abingdon: Routledge.
- 7 WHITMORE, J. (2009) *Coaching for performance: growing human potential and purpose – the principles and practice of coaching and leadership*. 4th ed. London: Nicholas Brealey Publishing.
- 8 Rogers, J (2012) *Coaching skills: a handbook*. Maidenhead: Open University Press.

Key journals

- 1 Coaching at Work
Available at: <https://twitter.com/coachatworkmag>, as well as in print
- 2 Human Resource Development International
Available at www.cipd.co.uk/journals
- 3 Human Resource Development Quarterly
Available at www.cipd.co.uk/journals
- 4 Human Resource Development Review
Available at www.cipd.co.uk/journals
- 5 International Journal of Training and Development
Available at www.cipd.co.uk/journals
- 6 Training and Development
Available at: www.cipd.co.uk/journals

Online resources

- 1 BLAKEMORE, R. (2014) *Coaching vs. mentoring – why the difference matters [online]*. Blog. Princes Risborough: Association for Project Management. Available at: <https://www.apm.org.uk/blog/difference-between-coaching-and-mentoring> [Accessed 11 April 2016].
- 2 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Aligning L&D with business objectives [online]*. Podcast 103. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/103-aligning-l-d-business-objectives.aspx> [Accessed 18 April 2016].
- 3 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Coaching and mentoring [online]*. Factsheet. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/factsheets/coaching-mentoring.aspx> [Accessed 11 April 2016].
- 4 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2008) *Coaching and buying coaching services [online]*. 2nd ed. Guide. London: CIPD. Available at: www.cipd.co.uk/hr-resources/a-z
- 5 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2007) *Coaching at the sharp end: developing and supporting the line manager as coach [online]*. Practical tool. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/practical-tools/developing-line-manager-coaching.aspx> [Accessed 11 April 2016].
- 6 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2012) *Coaching: the evidence base [online]*. Research report. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/research/coaching-evidence-base.aspx> [Accessed 11 April 2016].
- 7 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *Landing transformational change [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/landing-transformational-change_2014.pdf [Accessed 18 April 2016].
- 8 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Landing transformational change [online]*. Podcast 107. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/107-landing-transformational-change.aspx> [Accessed 18 April 2016].
- 9 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT and UNIVERSITY OF BATH. School of Management. (2015) *Landing transformational change: closing the gap between theory and practice [online]*. Research report. London: CIPD. Available at: https://www.cipd.co.uk/binaries/landing-transformation-change_2015-gap-theory-practice.pdf [Accessed 18 April 2016].
- 10 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *L&D: evolving roles, enhancing skills [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/l-d-evolving-roles-enhancing-skills_2015.pdf [Accessed 18 April 2016].
- 11 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *L&D: new challenges, new approaches [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/l-and-d_2014-new-challenges-new-approaches.pdf [Accessed 18 April 2016].
- 12 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Learning and development 2015: annual survey report [online]*. London: CIPD. Available at: http://www.cipd.co.uk/binaries/learning-development_2015.pdf [Accessed 18 April 2016].
- 13 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *Rethinking staff inductions [online]*. Podcast 89. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/89-rethinking-staff-inductions.aspx> [Accessed 18 April 2016].
- 14 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2011) *The coaching climate [online]*. Survey report. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/survey-reports/coaching-climate-2011.aspx> [Accessed 11 April 2016].
- 15 LITTLE, B. (2015) *Coaching and mentoring 1 [online]*. Blog. [-]: MindTools. Available at: <https://www.mindtools.com/blog/corporate/2015/09/25/coaching-mentoring-1/> [Accessed 11 April 2016].
- 16 REITZ, J. (2015) *The one key difference between coaching & mentoring [online]*. Blog. North Olmsted, OH: coachnet.org. Available at: <http://www.coachnet.org/blog/2015/04/06/the-one-key-difference-between-coaching-and-mentoring> [Accessed 11 April 2016].
- 17 TOWARDS MATURITY. (2015) *Embracing change: improving performance for business, individuals and the L&D Team [online]*. Article. London: Towards Maturity. Available at: <http://www.towardsmaturity.org/article/2015/11/05/embracing-change-improving-performance-benchmark/> [Accessed 18 April 2016].

Websites

- 1 www.ahrd.org
Website of the Academy of Human Resource Development
- 2 www.associationforcoaching.com
Website of the Association for Coaching
- 3 www.cipd.co.uk
Website of the Chartered Institute of Personnel and Development
- 4 <https://www.davidclutterbuckpartnership.com/articles-blogs/>
Website of the David Clutterbuck Partnership, featuring articles, blogs and videos, also on twitter at: <https://twitter.com/mentor2mentors>
- 5 www.emccouncil.org
Website of the European Mentoring and Coaching Council
- 6 www.ufhrd.co.uk
Website of the University Forum for Human Resource Development

Assessing Learning and Development

Unit title	Assessing Learning and Development
Level	3*
Credit value	6
Unit code	3ASL
Unit review date	September 2019

*RQF Level 3, comparable to Level 5 in Ireland, Level 6 in Scotland and EQF Level 4

Purpose and aim of unit

Assessment of learning is an essential aspect of L&D, not only for learners and trainers, but also for various other stakeholders. Assessment enables learners to recognise their progress and identify areas of strength and weakness whilst enabling L&D practitioners to gauge how learning activities are being received and where adjustments or extra efforts are required. For third parties such as awarding organisations, regulatory bodies and employers, accurate assessment underpins the validity and integrity of qualification systems. This unit enables learners to develop knowledge and clarity about different types of assessment, different assessment criteria and different assessment methods. Building on this knowledge, learners are required to practise the skills of assessment through planning, preparing and undertaking assessment in different L&D contexts, and providing accurate, clear and constructive verbal and written feedback.

This unit is suitable for persons who:

- are aspiring to, or embarking on, a career in L&D
- are already working as an L&D practitioner/assessor and wish to develop and accredit their capabilities in this area.

Learning outcomes

On completion of this unit, learners will:

- 1 Understand the principles and practice of assessment.
- 2 Be able to plan and prepare for assessment.
- 3 Be able to undertake a reliable, valid and fair assessment.
- 4 Be able to give accurate, clear and constructive feedback on the outcomes of assessment.
- 5 Be able to record and process assessment decisions.

Guided learning hours

The guided learning hours for this unit would normally be considered to be 30 with an additional 30 hours of self-directed learning for reading and the preparation of assessment evidence.

Unit content

Indicative content is provided for each of the learning outcomes of the unit. The content is neither prescriptive nor exhaustive but should enable achievement of the learning outcomes.

1 Understand the principles and practice of assessment.

Overview of different purposes/types of assessment – initial assessment, formative assessment and summative assessment; assessment of knowledge and skills (learning), assessment of occupational competence (performance in the workplace).

Differences: e.g. typical use of assessment methods, approach to grading, eligibility requirements of the assessor, context of assessment, acceptability of simulations and scenarios versus real work performance; definitions and comparisons of different types of qualifications.

Legal and regulatory requirements: e.g. health & safety, equalities, data protection and the requirements of regulatory or professional/statutory bodies (PSRBs).

2 Be able to plan and prepare for assessment.

Factors to be considered, e.g. what is to be assessed (e.g. learning, performance) against what criteria; relevant assessment requirements or guidance; best methods in relation to the type of assessment; availability of a valid assessment instrument/brief for candidate; who will be involved (assessor and candidate(s), any third parties); logistics: where and when assessment will take place; space and equipment requirements; risks and contingencies.

Assessment methods: e.g. assignments and case studies; examination of evidence or work products; observation of skills or of work performance; verbal or written question and answer; third party witness testimony; professional discussion.

Assessment planning: designing assessment instruments; devising assessment plans.

Assessment preparation: ensuring availability of all people and resources required by all parties.

3 Be able to undertake a reliable, valid and fair assessment.

Different types and components of criteria: e.g. learning outcomes, assessment criteria, marking /grading schemes. Different outcomes and grades e.g. pass/fail, met/not met, grading schemes.

Definitions of valid, reliable and fair; assessment guidance models, e.g. VACS

4 Be able to give accurate, clear and constructive feedback on the outcomes of assessment.

Principles and models of good practice in relation to giving feedback; required content of assessment feedback; definitions of accurate feedback, clear feedback and constructive feedback; definitions of developmental feedback and how/when it should be provided

5 Be able to record and process assessment decisions.

Definitions of terms: e.g. assessment record, mark sheet, other terms used for documents which record outcomes of assessment; examples of different documents; purposes and essential contents of records; typical, and examples of, organisational procedures and awarding organisation procedures in relation to assessment records. Requirements in relation to: sharing assessment records (relevant personnel e.g. candidate, assessor/tutor, IQA/internal moderator, EQA/ external moderator) and storing assessment records (internal, external procedures and legal constraints).

Unit assessment

To achieve this unit, the evidence the learner presents for assessment must demonstrate that they have met all the learning outcomes and assessment criteria.

Learning outcomes The learner will:	Assessment criteria The learner can:
1 Understand the principles and practice of assessment	1.1 Identify the differences between initial assessment, formative assessment and summative assessment. 1.2 Explain the differences between assessing knowledge, assessing skills and assessing occupational competence.
2 Be able to plan and prepare for assessment	2.1 Summarise the factors to be considered when planning for assessment. 2.2 Describe a range of assessment methods and when they are best used. 2.3 Plan and prepare for undertaking assessment.
3 Be able to undertake a reliable, valid and fair assessment.	3.1 Explain the criteria to be used in assessment and the requirements governing their use. 3.2 Match candidate work/evidence against criteria to make an assessment decision and justify how the assessment decision is valid, reliable and fair.
4 Be able to give accurate, clear and constructive feedback on the outcomes of assessment.	4.1 Explain principles of good practice for giving feedback. 4.2 Provide assessment feedback which is accurate, clear, and constructive to a candidate.
5 Be able to record and process assessment decisions.	5.1 Explain the purpose(s) of assessment records and what should be included. 5.2 Use an appropriate format, and follow organisational procedures for writing, sharing and storing assessment records.

Learning resources for unit: 3ASL

This section provides suggestions for suitable resources for this unit. The list is indicative only and should not be considered as prescriptive or exhaustive.

Essential reading

- 1 BEEVERS, K. and REA, A. (2016) *Learning and development practice in the workplace*. 3rd ed. London: Chartered Institute of Personnel and Development.
- 2 GRAVELLS, A. (2014) *Achieving your assessment and quality assurance units (TAQA)*. 2nd ed. London: Learning Matters Sage.
- 3 GRAVELLS, A. (2016) *Principles and practices of assessment: a guide for assessors in FE and the skills sector*. 3rd ed. London: Sage.
- 4 SAMBELL, K., MCDOWELL, L. and MONTGOMERY, C. (2013) *Assessment for learning in higher education*. Abingdon: Routledge.
- 5 SUSKIE, L. (2009) *Assessing student learning: a common sense guide*. 2nd ed. San Francisco: Jossey-Bass.
- 6 STEWART, J. and CURETON, P. (2014) *Designing, delivering and evaluating learning and development: essentials for practice*. London: Chartered Institute of Personnel and Development.

Key journals

- 1 Human Resource Development International
Available at: www.cipd.co.uk/journals
- 2 Human Resource Development Quarterly
Available at: www.cipd.co.uk/journals
- 3 International Journal of Training and Development
Available at: www.cipd.co.uk/journals

Online resources

- 1 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. CIPD megatrends: the trends shaping work and working lives. Available at www.cipd.co.uk/cipd-hr-profession/whats-new/megatrends.aspx
- 2 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. A wealth of resources on HR and learning and development.
- 3 CACHE (2012) *A guide to assessing CACHE QCF qualifications*. [St Albans]: CACHE. Available at: <http://www.cache.org.uk/Qualifications/AAQA/Documents/how-to.pdf> [Accessed 7 April 2016].
- 4 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Aligning L&D with business objectives [online]*. Podcast 103. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/103-aligning-ld-business-objectives.aspx> [Accessed 18 April 2016]
- 5 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *Landing transformational change [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/landing-transformational-change_2014.pdf [Accessed 18 April 2016].
- 6 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Landing transformational change [online]*. Podcast 107. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/107-landing-transformational-change.aspx> [Accessed 18 April 2016].
- 7 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT and UNIVERSITY OF BATH. School of Management. (2015) *Landing transformational change: closing the gap between theory and practice [online]*. Research report. London: CIPD. Available at: https://www.cipd.co.uk/binaries/landing-transformation-change_2015-gap-theory-practice.pdf [Accessed 18 April 2016].
- 8 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *L&D: evolving roles, enhancing skills [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/l-d-evolving-roles-enhancing-skills_2015.pdf [Accessed 18 April 2016].
- 9 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *L&D: new challenges, new approaches [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/l-and-d_2014-new-challenges-new-approaches.pdf [Accessed 18 April 2016].
- 10 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Learning and development 2015: annual survey report [online]*. London: CIPD. Available at: http://www.cipd.co.uk/binaries/learning-development_2015.pdf [Accessed 18 April 2016].
- 11 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *Rethinking staff inductions [online]*. Podcast 89. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/89-rethinking-staff-inductions.aspx> [Accessed 18 April 2016].
- 12 McCULLOCH, M. (2007) *An introduction to assessment*. Glasgow: University of Glasgow. Available at: http://www.gla.ac.uk/media/media_12158_en.pdf [Accessed 7 April 2016].
- 13 TOWARDS MATURITY. (2015) *Embracing change: improving performance for business, individuals and the L&D Team [online]*. Article. London: Towards Maturity. Available at: <http://www.towardsmaturity.org/article/2015/11/05/embracing-change-improving-performance-benchmark/> [Accessed 18 April 2016].

Websites

- 1 www.ahrd.org
Website of the Academy of Human Resource Development
- 2 www.cipd.co.uk
Website of the Chartered Institute of Personnel and Development (CIPD)

Organising Learning and Development Events

Unit title	Organising Learning and Development Events
Level	3*
Credit value	6
Unit code	3LDE
Unit review date	September 2019

*RQF Level 3, comparable to Level 5 in Ireland, Level 6 in Scotland and EQF Level 4

Purpose and aim of unit

Organising events, from single learning and development (L&D) activities to large-scale conferences, is a key responsibility of the L&D function. This unit is designed for L&D professionals who have responsibility for organising and supporting L&D events and will provide them with the knowledge and skills required to be effective in an event management role. The unit covers key aspects of event management from pre-event planning, through co-ordinating and finally reporting on the completed event. Learners will gain a better understanding of event themes and design, and the legal, logistical and financial aspects of managing events. The unit also focusses on different ways of promoting L&D events, how promotions are targeted for particular audiences and on the essential records that should be produced for each event. Finally, the unit requires learners to review and take practical steps to develop their own customer service skills.

This unit is suitable for persons who:

- are working in or are seeking to develop a career in L&D.
- aim to further their understanding of the principles and practice of event management.
- aim to develop their own event management and customer service skills.

Learning outcomes

On completion of this unit, learners will:

- 1 Understand factors to be considered when planning a learning and development event.
- 2 Know how to promote a learning and development event.
- 3 Be able to plan and co-ordinate a learning and development event.
- 4 Be able to review and develop own customer service skills.

Guided learning hours

The guided learning hours for this unit would normally be considered to be 30 with an additional 30 hours of self-directed learning for reading and the preparation of assessment evidence.

Unit content

Indicative content is provided for each of the learning outcomes of the unit. The content is neither prescriptive nor exhaustive but should enable achievement of the learning outcomes.

1 Understand factors to be considered when planning a learning and development event.

Event types: e.g. training courses, conferences, seminars, trade shows, exhibitions, networking, team-building, award ceremonies, executive retreats.

Key factors: purpose, theme and event objectives, target audience (type and size), speakers (including keynote if applicable)/facilitators, venue, joining instructions including travel, catering, health and safety considerations, marketing materials, delegate packs, costs and budgets.

2 Know how to promote a learning and development event.

Targeting audiences: definition of target market and identification of marketing mix variables (product, place, promotion and price); distribution lists, security groups, global audiences

Methods and materials: e.g. flyers, leaflets, brochures, newsletters, advertisements, 'word of mouth', e-mail bulletins, using social media e.g. Twitter, LinkedIn, Facebook; advantages and disadvantages of each mode in terms of cost and outreach.

3 Be able to plan and co-ordinate a learning and development event.

Planning phase: production and contents of an event plan e.g. activities, timing, event title, theme (where appropriate), key purpose and objectives, speakers/facilitators, facts about audiences/participants, venue and resource information, costs.

Overseeing: preparation and dissemination of promotional materials; liaison with speakers/facilitators; technology requirements; joining instructions; fees; booking venue and accommodation (if required); liaising with venue over rooms, facilities, catering; anticipating problems and identifying contingency arrangements e.g. speakers not showing up/cancelling at the last minute.

Co-ordination phase: e.g. ensuring venue is prepared, welcoming speakers and delegates and providing badges and event materials, providing knowledgeable and courteous services to speakers and delegates, managing/supporting other event management colleagues as appropriate; time managing sessions where appropriate; executing contingency arrangements when necessary; giving out evaluation materials and/or guidance on post event evaluation.

Post event phase: checking event is within budget; collating summary data; producing event reports with key information e.g. operational information, budget details, lessons learned & recommendations for future events.

4 Be able to review and develop own customer service skills.

Customer service skills: e.g. patience, attentiveness, effective communication, knowledge of the event content, time management, 'reading' customers, goal-oriented, ability to handle the unexpected & 'difficult' customers, 'closing' ability.

Unit assessment

To achieve this unit, the evidence the learner presents for assessment must demonstrate that they have met all the learning outcomes and assessment criteria.

Learning outcomes The learner will:	Assessment criteria The learner can:
1 Understand factors to be considered when planning a learning and development event.	1.1 Compare different types of learning and development event. 1.2 Explain the main logistical, legal, and financial factors to be considered when planning for different learning and development events. 1.3 Explain the main responsibilities of learning and development event organisers.
Know how to promote a learning and development event.	2.1 Discuss how different audiences are targeted for different learning and development events. 2.2 Evaluate the use of different communication methods and materials for promoting learning and development events.
3 Be able to plan and co-ordinate a learning and development event.	3.1 Produce a project plan for a specific learning and development event that includes contingencies for unexpected occurrences. 3.2 Co-ordinate a learning and development event, demonstrating effective leadership, financial management and time management skills. 3.3 Maintain records of a learning and development event, including financial and operational information, and produce a summary Event Report.
4 Be able to review and develop own customer service skills.	4.1. Review own customer service skills and identify improvement areas. 4.2. Select and plan activities for developing own customer service skills.

Learning resources for unit: 3LDE

This section provides suggestions for suitable resources for this unit. The list is indicative only and should not be considered as prescriptive or exhaustive.

Books

- 1 BEEVERS, K. and REA, A. (2016) *Learning and development practice in the workplace*. 3rd ed. London: Chartered Institute of Personnel and Development.
- 2 GETZ, D. and PAGE, S.J. (2016) *Event studies: theory, research and policy for planned events*. 3rd ed. Abingdon: Routledge.
- 3 RUTHERFORD SILVERS, J. (2013) *Risk management for meetings and events*. Abingdon: Routledge.
- 4 PRESTON, C. A. (2012) *Event marketing: how to successfully promote events, festivals, conventions, and expositions*. 2nd ed. Hoboken: John Wiley.
- 5 SHONE, A. and PARRY, B. (2013) *Successful event management: a practical handbook*. 4th ed. Andover: Cengage Learning.
- 6 STEWART, J. and CURETON, P. (2014) *Designing, delivering and evaluating L&D: essentials for practice*. London: Chartered Institute of Personnel and Development.

Journals

- 1 Human Resource Development Quarterly
Available at: www.cipd.co.uk/journals
- 2 International Journal of Training and Development
Available at: www.cipd.co.uk/journals
- 3 European Journal of Training and Development

Online resources

- 1 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. CIPD *Megatrends: the trends shaping work and working lives*. Available at www.cipd.co.uk/cipd-hr-profession/whats-new/megatrends.aspx
- 2 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. A wealth of resources on HR and learning and development. Available at www.cipd.co.uk/hr-resources/a-z
- 3 BECKINGHAM, S. (2015) *Tips on using Twitter for conferences and events: ideas for organisers and participants [online]*. Blog. [Sheffield]: Social Media for Learning. Available at: <https://socialmediaforlearning.com/2015/02/09/tips-on-using-twitter-for-conferences-and-events-ideas-for-organisers-and-participants/> [Accessed 11 April 2016].
- 4 BRYNLEY-JONES, L. (2013) *18 creative ways for event organisers to use social media [infographic] [online]*. Blog. [-]: Wallblog. Available at: <http://wallblog.co.uk/2013/05/07/18-creative-ways-for-event-organisers-to-use-social-media-infographic/> [Accessed 11 April 2016].
- 5 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Aligning L&D with business objectives [online]*. Podcast 103. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/103-aligning-l-d-business-objectives.aspx> [Accessed 18 April 2016]
- 6 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *Landing transformational change [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/landing-transformational-change_2014.pdf [Accessed 18 April 2016].
- 7 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Landing transformational change [online]*. Podcast 107. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/107-landing-transformational-change.aspx> [Accessed 18 April 2016].
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- 9 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *L&D: evolving roles, enhancing skills [online]*. Research report. London: CIPD. Available at: http://www.cipd.co.uk/binaries/l-d-evolving-roles-enhancing-skills_2015.pdf [Accessed 18 April 2016].
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- 11 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2015) *Learning and development 2015: annual survey report [online]*. London: CIPD. Available at: http://www.cipd.co.uk/binaries/learning-development_2015.pdf [Accessed 18 April 2016].
- 12 CHARTERED INSTITUTE OF PERSONNEL AND DEVELOPMENT. (2014) *Rethinking staff inductions [online]*. Podcast 89. London: CIPD. Available at: <http://www.cipd.co.uk/hr-resources/podcasts/89-rethinking-staff-inductions.aspx> [Accessed 18 April 2016].
- 13 KAHN, J. (2011) *Seven things I've learnt about organising a conference [online]*. Blog. Ashford: Jinfo. Available at: <https://web.jinfo.com/go/blog/65558> [Accessed 11 April 2016].
- 14 LEJEUNE, A. and DOUMENJOU, L. (2015) *Top tips for organising a successful programme learning event [online]*. Blog. Oxford: Oxfam. Available at: <http://policy-practice.oxfam.org.uk/blog/2015/09/top-tips-for-organising-a-successful-programme-learning-event> [Accessed 11 April 2016].
- 15 MINDTOOLS. *Managing conferences and events: planning successful events [online]*. Article. London: MindTools. Available at: <https://www.mindtools.com/pages/article/managing-conferences-events.htm> [Accessed 11 April 2016].
- 16 TOWARDS MATURITY. (2015) *Embracing change: improving performance for business, individuals and the L&D Team [online]*. Article. London: Towards Maturity. Available at: <http://www.towardsmaturity.org/article/2015/11/05/embracing-change-improving-performance-benchmark/> [Accessed 18 April 2016].
- 17 VERNON, C. (2016) *28 rules for promoting your event on Twitter [online]*. Blog. London: Senate House Events. Available at: <http://www.senatehouseevents.co.uk/features/28-rules-promoting-your-event-twitter> [Accessed 11 April 2016].

Websites

- 1 www.ahrd.org
Website of the Academy of Human Resource Development
- 2 www.cipd.co.uk
Website of the Chartered Institute of Personnel and Development (CIPD)
- 3 <http://www.learningtechnologies.co.uk/>
Website for a company that organises learning and development exhibitions and conferences, includes archives of programmes on YouTube and web television channels as well as webinars
- 4 <https://www.td.org/Publications/Blogs/L-and-D-Blog>
Learning and Development blog from the Association of Talent Development

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