



5LD03 – Facilitate personalised and performance- focused learning

Assessment Session

Session content

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What will I gain from this unit?

This unit focuses on the effective facilitation of learning activities, including knowing how to prepare an impactful intervention, making effective use of pre-learning activities, and personalisation to create learning that can be transferred back into the organisational context. In addition, it explores facilitation techniques, whether face-to-face or online, and the principles and ethics that underpin the delivery of an outstanding learning experience.



Case study

Your role, as a learning and development business partner working in a large government-funded organisation, is to:

- Create a “Training preparation brief”, which will be shared with all the L&D specialists, helping them understand the importance of preparing for a “Lunch & Learn” event that you have designed. You will also produce a “Train the Trainer” demonstration video lasting no more than 15 minutes, showing “what good looks like” for the L&D specialists.
- Create a “How To... Ensure Learning Transfer Guide”, aimed at supporting line managers to embed training within the organisation.

5LD03 - Task 1

Task 1 – Part A - Create a “Training preparation brief” for L&D specialists

You are required to create a “Training preparation brief” that will be shared with all the L&D specialists, to help them understand the importance of preparing for a “Lunch & Learn” event, where you will share some best practice around “facilitation skills”.



Hints and Tips:

Please review the guidance on the assessment brief

Task 1 – Part A - Training preparation brief of around 1,700 (+ or – 10%) words

Task 1 – Part B - A maximum 15-minute video of you providing a demonstration of a “Lunch & Learn” with a small group of about three learners, demonstrating facilitation and learning effectiveness monitoring skills.

Activities and criteria

Task 1 – Part A – Activity 1

Activity	Criteria	Signpost to VLC
Evaluate internal and external factors to consider as part of preparation for learning and development activities.	AC1.1 - Evaluate three internal and three external factors that you have considered as part of preparation for a 15-minute “Lunch & Learn” learning and development activity.	Week(s) 1



Hints and Tips:

- There are so many things that you could evaluate here, (you need **three**), so think about any of the following: training materials; training space; the trainees; yourself as facilitator.
- You could also consider evaluating the following as part of the factors that you would consider: training content; training environment; training facilities and materials; training schedule; training presentation style...
- May be consider evaluating some items regarding Malcolm Knowles' adult learning theory, too.
- Finally, you may also choose to evaluate items based around the flipped classroom theory by Jeff Dunn (2014). The main elements of the flipped classroom are: plan, record, share, change, group, regroup.

Task 1 – Part A – Activity 2

Activity	Criteria	Signpost to VLC
Prepare a range of personalised, accessible learning resources to enhance learning.	AC1.2 – Provide three personalised, accessible learning resources that you have prepared to enhance learning. (Remember the topic for these three resources is of your choice).	Week(s) 1



Hints and Tips:

- There is a huge list of potential curated resources you could choose from, (you need **three**), for example: PowerPoint presentations; physical practice equipment; display objects; flip chart; infographics; handouts; PDFs; case studies; exercise materials; workbook; curated video, including any curated TED or TEDx Talks etc.
- Include a discussion about **when** you intend to use these learning resources and **how** you will make these resources "accessible". For example, will you use these resources prior to the "Lunch & Learn", during it or after it? And **where** will you "house" them for future use?

Task 1 – Part A – Activity 3

Activity	Criteria	Signpost to VLC
Discuss the concept of facilitation and facilitation techniques that can be applied to support learning.	AC2.1 - A discussion on the concept of facilitation and three key facilitation techniques that can be applied to support learning.	Week(s) 2



Hints and Tips:

- You'll need to provide a brief discussion on the concept of facilitation and how it can be used.
- Provide a brief discussion about the "locus of control", moving from instructor, right the way through to facilitator.
- You'll need to provide examples of **three** facilitation techniques that you use / would use in a learning intervention and discuss why they may be successful in engaging participants.

Task 1 – Part A – Activity 4

Activity	Criteria	Signpost to VLC
Explore the ethical factors involved in facilitation of learning.	AC2.3 - An exploration of three ethical factors you have considered in the facilitation of this learning.	Week(s) 2



Hints and Tips:

- Please explore [bias in learning and facilitation](#): the “power dynamics” in the facilitator-learner relationship. The ability to influence through language and actions, being objective, neutral and balanced in your positioning of facilitation and awareness of your own potential biases.
- Please explore the [ethical use of learning resources](#): this is about understanding your learners, and the ethical use of learning resources. Here we reviewed the use of the psychology-based, personality “tests” and learner assessments, and using recognised and scientific tools over ones that may have bias in them.
- Please explore the actual [validity of the resources](#): the “validity of resources” is a critical ethical skill to have, and the Origin, Purpose, Value, Limitations (OPVL) methodology is a recognised way of “testing” the validity of such resources carefully.

Task 1 – Part B – Training preparation briefing and best-practice video

You will also be required to produce a 15-minute “Train the Trainer” demonstration video, via YouTube, where you demonstrate “what good looks like”, in terms of delivering and recording your session using facilitation skills and the three resources you have prepared with ‘real-world’ learners (up to three learners).



Hints and Tips:

Please review the guidance on the assessment brief

Task 1 – Part A - Training preparation brief of around 1,700 (+ or – 10%) words.

Task 1 – Part B - A maximum 15-minute Video of you providing a demonstration of a “Lunch & Learn” with a small group of about three learners, demonstrating facilitation and learning effectiveness monitoring skills.

Task 1 – Part B - Activity 5

Activity	Criteria	Signpost to VLC
Deliver or facilitate an inclusive learning and development activity, using resources that meet objectives.	AC2.4 - Facilitate your “Lunch & Learn” learning and development activity with a small group of three or less ‘learners’ in an inclusive manner, utilising resources that meet the stated objective/s for this session.	Week(s) 2



Hints and Tips:

- Create a “[training demonstration](#)” [video](#) and provide a **URL link** to the hosting site, preferably YouTube. It can be on a topic entirely of your own choice, lasting *no longer than 15 minutes*, in which you must:
 1. Provide learners with at least [one meaningful learning objective](#) for the session.
 2. You must either include, or make reference to, the [three “personalised, accessible learning resources”](#) they created earlier, to enhance their learning experience.
 3. You must utilise at least [one “facilitation” model or technique](#).

Task 1 – Part B – Activity 6

Activity	Criteria	Signpost to VLC
Demonstrate techniques for monitoring the effectiveness of learning activities, including making adjustments to meet the needs of individual learners within a group context.	AC2.2 - Demonstrate techniques for monitoring the effectiveness of this learning activity, including making any adjustments needed to meet the needs of individual learners within the group.	Week(s) 3



Hints and Tips:

- You will need to demonstrate techniques for [monitoring the effectiveness of this learning activity](#), including making adjustments to meet the needs of individual learners within this group context. Consider the following:
 1. Demonstrating effective [open questioning techniques](#) to engage your learners.
 2. Demonstrating some form of [summative assessment](#) at the end of the “Lunch & Learn” to check learner’s competence, knowledge, ability or likelihood to be able to do what they have been trained to do.
 3. If any learner has had difficulty during the session, to answer questions, for example, you will need to consider [demonstrating required adjustments](#) to help the individual learner understand the topic, by whatever means necessary.

Chat

Task 1 - Understanding checkpoint

5LD03 - Task 2

Task 2 – Create a “How To... Ensure Learning Transfer Guide” to support line managers to embed training

To support this launch of the first of these new “Lunch & Learn” sessions, you have identified that Line Managers are not really aware of the need to support the whole “Learning Transfer” piece, so you have tasked yourself with creating a “How To... Ensure Learning Transfer Guide” to share on the organisation’s intranet & L&D SharePoint site.



Hints and Tips:

Please review the guidance on the assessment brief.

Create a “How To... Ensure Learning Transfer Guide” aimed at line managers to help them understand the role they play in supporting learning transfer. It should be 2,200 words (+/- 10%).

Task 2 – Activity 1

Activity	Criteria	Signpost to VLC
Explain the concept of 'transfer of learning' and its significance in workplace learning.	AC3.1 – An explanation of the concept 'transfer of learning' and its significance in workplace learning, detailing five benefits of ensuring learning transfer and five risks of not ensuring learning transfer.	Week(s) 4



Hints and Tips:

- Please explain the concept of 'transfer of learning' and its significance in workplace learning. Also provide **five benefits** of ensuring that learning transfer happens and **five risks** that could happen if there was no evidence of learning transfer.
- Please explain **one of the models** you have studied that can be used in some way to support the identification of "learning transfer" into a workplace environment.

Task 2 – Activity 2

Activity	Criteria	Signpost to VLC
Critically assess strategies for supporting the transfer of learning from learning and development activities to the workplace.	AC3.2 – A critical assessment of three strategies for supporting the transfer of learning from learning and development activities into the workplace.	Week(s) 4



Hints and Tips:

- Please critically assess the use of “[work-based projects](#)” as a way of transferring learning, which is all about ‘learning while doing’.
- Please critically assess the use of “[action learning sets](#)” which provides the learner the opportunity to relate training to their own experience and question how to apply it to their own needs and challenges.
- Please critically assess the use of a “[coaching provision](#)” that is either line manager-driven and supported or provided by an external source, to support the embedding of learning with individuals and potentially teams, too.

Task 2 – Activity 3

Activity	Criteria	Signpost to VLC
Evaluate the role of line managers in supporting transfer of learning for their team members, and how learning and development can support them in this.	AC3.3 – An evaluation of the role that line managers have in supporting transfer of learning for their team members, and explain five ways in which learning and development can support them in this.	Week(s) 5 ("10-step model to engage line managers in learning transfer" is in the Tutor Support Session 2)



Hints and Tips:

- Please evaluate any **five** of the ten elements contained within the **10-step model to engage line managers in learning transfer**, evaluating how you would go about creating the right environment or opportunities to work with line managers in delivering the **five elements** in the 'real world' of the working environment.
- Please also provide a discussion about how the **learning and development function** can support line managers in supporting them to support the transfer of learning to their team members.

Chat

Task 2 - Understanding checkpoint

5LD03 – Further information

[Roffey Park Research - What are facilitation skills and how do you facilitate?](#)

[MindTools Article – The Role of a facilitator](#)

[Association of Facilitators Report - Bella Mehta: The organisational impact of facilitation skills](#)

[CIPD Report - Learning and skills at work](#)



5LD03 – Important information

Wordcount:

Task 1: 1,700 words (+/-10%). Task 2: 2,200 words (+/-10%)

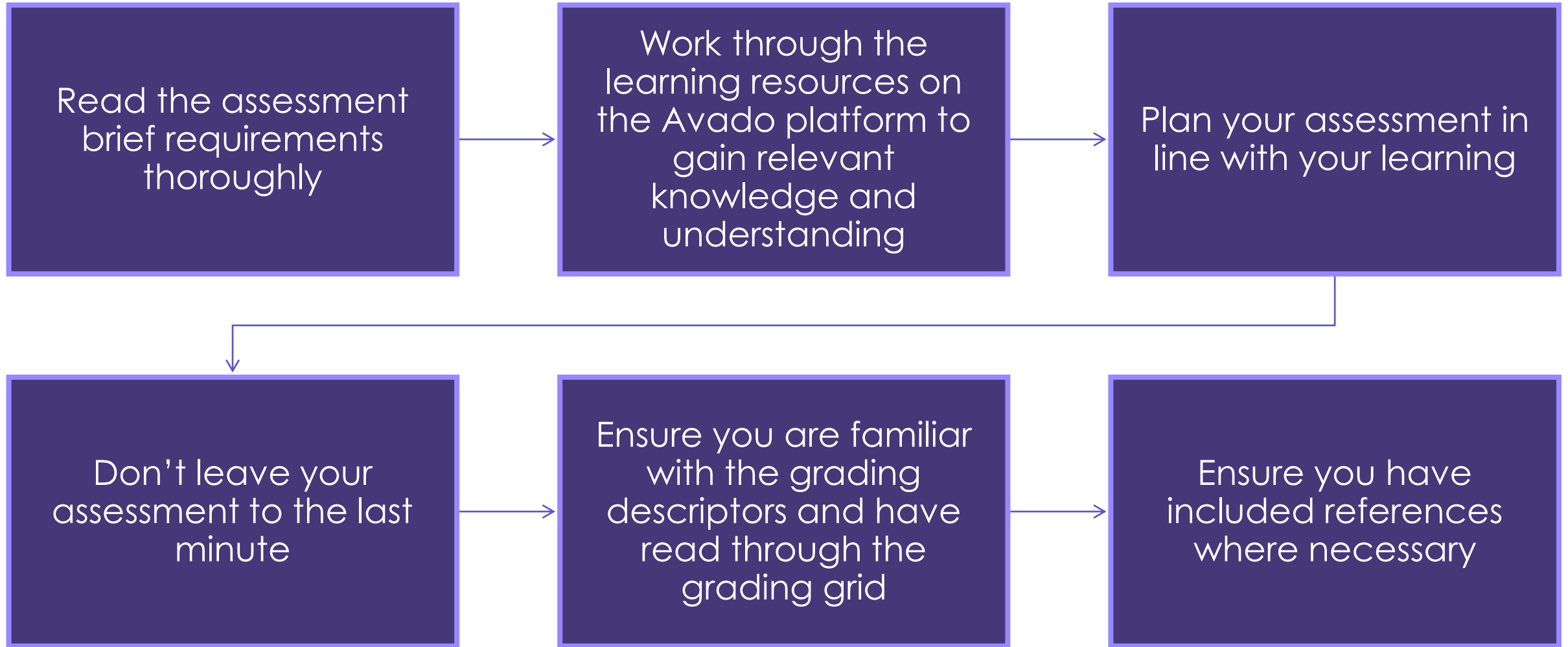
What's counted:

- Included - All your own words that answer the questions directly, even if they are presented in a table
- Not included - title page, contents page, headings/subheadings, in-text citations and quotes, reference list, bibliography and appendices

Submission file: (name your files as follows)

- Task 1 – Part A: training preparation brief <your name>
- Task 1 – Part B: [URL link](#) to web-hosted [15-minute video](#) (include this link in your Word document used to answer Task 1 - Part A.
- Task 2: Presentation <your name>

Next steps:



Question time

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