



Leonardo da Vinci
Pilot projects

TT-PLUS PROJECT

Pontydysgu, Wales

First country report

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1. Context of the UK case studies in the TT-Plus project

1.1. Characteristics of occupational system

Before we start to describe the occupational system in the UK, some initial remarks are necessary. It is not possible to talk about a UK context of training. The training systems vary greatly between Scotland, Northern Ireland, England and Wales. We will concentrate our description on the situation in Wales and England because their systems are in many ways quite similar and our case studies have been conducted in these two British regions.

Previous policy focussed mainly on an educational route to higher education. Initial vocation education within companies was promoted mainly within youth training initiatives like the highly promoted Youth Training Scheme YTS during the 1990s (Evans et al. 1990). The introduction of the UK's Modern Apprenticeship in 1993 "added a third 'stakeholder' to the apprenticeship equation as it gave the State a direct role in its funding and specification" (Fuller / Unwin 2003, 409). In contrast to other countries like Greece, government bodies play an important role in vocational education, even when it takes place within companies. Usually the company employs the apprentices and the government supports or funds the theoretical part of the education within colleges or external training providers. The government is increasingly promoting apprenticeship in England is trying to support more and more the apprenticeship way creating awards were successful apprentice and his employer are awarded. This award is funded by The Learning and Skills Council (LSC).

To understand the occupational system in England and Wales one has to have a closer look at the 'National Qualification Framework' (NQF). This competence-based approach marked a shift from formal examinations to measuring the level of performance. In the English occupational system qualifications are differentiated according to 8 levels.

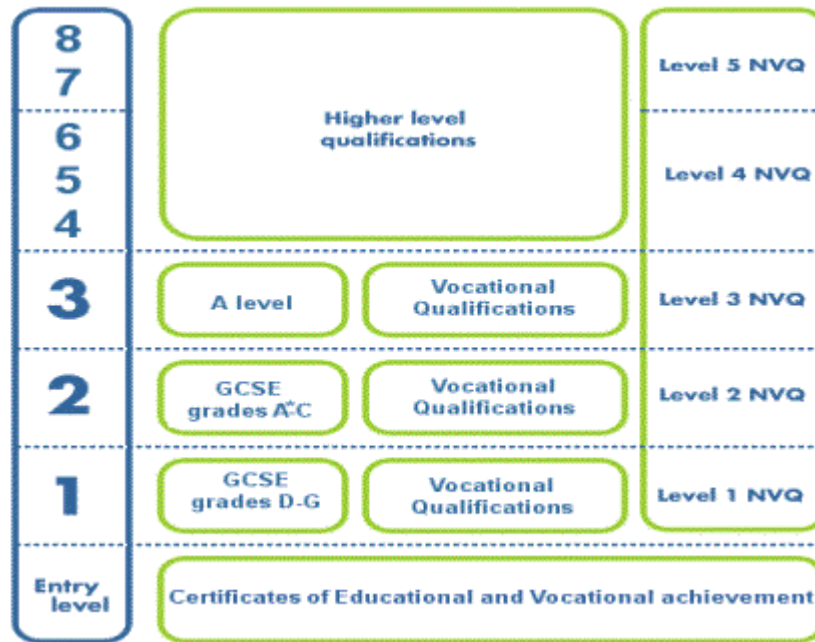


Fig 1: The English National Framework for Recognising Achievement, Source: Hayward, G. (2004).

We can identify three basic pathways or tracks within the NCF: (Brockington 2005)

- The general or academic pathway which includes General Certificate of Secondary Education and on Advanced levels.
- The general vocational pathway which includes a range of different vocational qualifications. Part of the training provided by the FE leads to GNVQs, General National Vocational Qualifications, that prepare students for broad occupational areas rather than specific job functions.
- The occupational pathways which describes learning within the work-context or within apprenticeship programmes certificated by the NVQs (National Vocational Qualifications).

The National Vocational Qualification framework (NVQ) was introduced in 1986. The NVQ is based on a competence approach where a person has to be able to proof that she / he can perform a function effectively in the workplace. NVQs are based on accepted standards of competences defined by sector based industrial lead bodies (NTOs). Whereas the occupational pathways lead to qualification via work-based learning, vocational qualifications through the general vocational pathways are provided by the Further Education (FE) colleges. Thus the same NVQ can be obtained in two different ways: via FE college education or via apprenticeship programmes. The reputation of the occupational pathway can carry higher

esteem dependent in the reputation of the company, even though the general vocational pathway is the more common form of further education in England and Wales.¹

1.2. Trainers in the partners' context

No distinction is made between teachers and trainers in the British case. Official documents state that: *“the term ‘teacher’ has been used generically in this document to represent teachers, tutors, trainers, lecturers and instructors”* (http://www.lluk.org/events/tqf_wales_consultation_event.html).

A distinction between teachers and trainers does not make any sense in the light of the FE colleges. In these colleges, experienced skilled workers and professionals are employed to teach (often part-time) their vocational skills. This can result in competition for skilled workers between business and FE colleges.

In 2004 the government published a statement called “Equipping our Teachers for the Future: Reforming Initial Teacher Training for the Learning and Skills Sector”. (DFES 2004). In this paper the Department for Education and Skills (DFES) stated that they aim at developing:

- .. “the skills strategy, which aims to engage adults and employers with the sector and to improve the national supply of skills, often in ways that go beyond more conventional teaching in a classroom or workshop...
- Our reforms embrace teacher training across the whole of the learning and skills sector. Trainers in work-based learning and tutors in adult and community learning need access to teacher training like their college-based colleagues. In the same way, trainers who work in the wider public sector (including for example, the emergency services and the armed forces) and from large private sector employers take initial teacher training courses run by the sector. “ (DFES 2004, 4f.)

The paper acknowledges the broadening of training functions from traditional training departments (where these existed in the companies) and FE colleges to a variety of functions related to training like supervisors, coaches and work-based training assessors.

¹ The British landscape is shaped by a huge variety of bodies specified for certain areas. A list can be found in the Country_Report_Uk of Refernet (<http://www.refernet.org.uk>).

1.3. Trainers' training, qualifications and qualification requirements

The occupation of a trainer was regulated as any other occupation through NVQs. NVQs for the training profession could have been obtained at levels 3, 4 and 5 summarised by Marsh et al. 1999 who stated:

1. "NVQ level 3 relates to skills in training and development – coaching, mentoring, instructing and assessing
2. NVQ level 4 relates to management and curriculum development of training programmes as well as the delivery (a) as above.
3. NVQ level 5 relates more exclusively to a skills in decision-making in training and development as training manager (b) above, but also more as a policy decider."

Since 2001 it became mandatory for new FE teachers to show proper training / teaching qualifications. Interestingly: the Confederation of British Industry (CBI) describes the primary requirements of trainers in the workplace as to:

- Lead team-building
- Coach employees to get vocational qualifications
- Assess employees in the workplace for vocational qualifications
- Balance the day to day operational demands of the workplace with opportunities for employees to train and develop on the job.

(Marsh et al. 1999)

These requirements are not related to the technical or subject based aspects of vocational training but emphasize the ability of a trainer to enable learning. This can also be seen in studies conducted by the Chartered Institute of Personnel and Development (CIPD) among their members. The CIPD provides feedback, networks, professional development routes and framework for its members in HRD and training. The institute undertakes an annual learning and training development survey.

The CIPD stated that two propositions are the most significant change:

- "A shift is taking place from training, an instructor-led content-based intervention, to learning, which is a self-directed work-based process, leading to increased adaptive capacity.
- Many different HR roles are involved in the people development effort and the boundaries between organisational development, management development and training are becoming increasingly blurred". (CIPD 2007)

Training is shifting from classroom based training to learning in the workplace with a change in the role of the trainers. Learning is not exclusively part of the training-trainee relationship but becomes more and more a dispersed activity within the company.

The CIPD identified four actors for learning within the company: employer, line manager, individual learner, trainer / facilitator. The survey indicates that more and more line managers will take over functions as coaches to facilitate the learning process of their co-workers.

1.4. Policies on trainers qualifications and professional development

In September 2007 important reforms have been introduced in England and Wales regarding the qualification of teachers, tutors, trainers, lectures and instructors, based on the recommendations of the DfES paper from 2004. Now two pathways have been designed in the reformed Initial Teacher Training (ITT): teachers can obtain a Qualified Teacher, Learning and Skills (QTLS) status or the Associate Teacher, Learning and Skills (ATLS) status. QTLS is for full-time teachers, ATLS is targeted at part-time teachers.

Within these pathways, revised qualifications and new professional standards have been developed. There are 6 overarching standards (LLUK 2007, 2).

- “Domain A Professional values and practice
- Domain B Learning and teaching
- Domain C specialist learning and teaching
- Domain D Planning for learning
- Domain E Assessment for learning
- Domain F Access and progression”

Of most interest is that within ITT there is a requirement for continuing professional development for all teachers: “All teachers, tutors, trainers, lectures and instructors, including those working before 2001 will be required to fulfil at least 30 hours of CPD, less for part-time contracted persons.”

This new reforms apply only to FE teachers at the moment, ignoring trainers within companies or employed by private training organisations working for business. But we can assume that the next steps are also to integrate trainers within the workplace due to the emphasis on this trainer group in the DFES paper.

1.5. Reasons for the selection of case studies

We have decided not to look at FE teachers as trainers but as trainers who work in the field of Continuous Vocational Education within or in close relation to the company.

The first case is the case of an external IT trainer who provides IT training for a consultancy. The case is of interest for the project because the shift from class-room training to training within the work process has been taken place in this case study.

The second case describes a community empowerment programme where remote impoverished communities can send their community activists on trainings. The case is paradigmatic because it describes the governmental influence on the training through funding. It deals with impoverished communities therefore integrate a target group which is related to the governmental funded IVET.

The third case has been chosen as a best practice example of a training scheme that emphasizes learning as a self-directed work-based process. Aspects of organisational change, learning and development are intertwined; innovative methods like action-learning sets are used. The above described discussions to separate learning from education, to enable people to learn by themselves is strongly supported by the work of the trainer in this last case study.

2. Case description

2.1. TTPlus case description – CONSULT Partners, UK

1. Introduction

The data selection has been a group interview with K. from IT TRAINING and G. Charles from CONSULT Partners.

Number of interviews + function of the interviewees

K. works for IT TRAINING, a family based business that started as an enterprise unit at a local college specialised in selling vocational training for companies to bring some money into college. Later the college laid out all staff and Ks. mother set up there own business. K. signed in part time when he left school in 2000, went part time to college for a degree in IT and E-learning. In the last year he became full time employed, when the other partner left, K. took over the position as a director of the company. At the moment 2 full-time- employed people are working in IT TRAINING (K. and his mother) with a network of 8 other trainers.

During peak times sometimes 6 persons are paid in a month. K. did not have any experiences in training / teaching. The reason for becoming an IT trainer was that it was needed within the portfolio of IT TRAINING. On college he did neither receive any practical training, but learning-theories were a part of the e-learning course. He holds a vocational degree due to this he could transfer almost immediately the stuff learned in college into a course.

G. is responsible to organise the IT training within CONSULT Partners. He joined the company in 2000 as a graduated trainee. He than became a consultant who also trained clients and colleagues in the use of SA Partner solutions. Informally, because he was the youngest within the company, everyone with OFFICE problems came to him. When it was formalised, he became officially the IT manager of the company. He organise the training for IT, holds the budget and uses the training himself. He holds a double function in the interview

1. As the stakeholder who organise the training
2. As one of K. trainees

2. Company profile

History of development of the company

CONSULT Partners was established in 1993 and was the first consultant on the UK market for lean enterprise consultancy. It is a spin-off from a Research Center. Aim was the transfer of the results into the market.

Structure

The company works with a partner structure.

CONSULT Partners is a consultancy in 5 topics: Strategic Management, Lean Enterprise, Six Sigma, Supply Chain Alignment, Change Management. Started in a regional market it has now grown with offices in places in whole UK. The business of CONSULT Partners also includes training activities: in case a client wants to have an internal consultant CONSULT Partners trains them in methods and techniques.

Thus training is delivered on several layers: internally (IT, soft-skills, presentation training etc.), train the trainer internally (training consultants how to deliver material to the client), externally (train clients in use /and training of CONSULT Partners methods).

K. (trainer in this case study) was emphasizing that each type of consultant involves in some aspects training, even if you are selling an idea, you provide training of the underlying idea.

Location (factors)

4 offices throughout the country..

Number of employees

10 partners are forming CONSULT Partners, employing a team of 50 people, consultants as well as administrative staff.

3. Competences of a trainer

It seems that CONSULT Partners has only a selection process not for trainers, but for consultants internally or for their clients. K. came to CONSULT Partners because of personal contact to G.. G. was trained by Karen, K. mother and founder of IT TRAINING, he needed also training in IT and came into contact with K.. After being satisfied with K. work, G. brought him into CONSULT Partners.

For G. a good trainer can work in different situations: one-to-one, work in a group. Most important is the ability to bring everyone up to the same level without people realizing that some are ahead of them. Group management is the key issue; a good trainer has to understand the group and what the needs are. He gave the example of how K. is working: In a group of 6 people, 2 can manage the course within 3 hours. K. will give them other things to do that are not part of the session, so these 2 persons feel good because they are moving on, others do not feel bad, because they are still on the syllabus.

From his personal experience K. does not like time wasting, no much introduction, “I do not care about their names”, “I hate it when they are finished with the syllabus and time is left.”

He employs trainers with certain competences and attitudes: Completely solution orientated in their work, which means

- “Someone who is not faced at all by anything”
- People do not know what they want, they describe a problem, but when the trainer is getting to the details, something different is needed
- Trainer has to learn 50% more than what is the course about, because the trainer has to be able to take the course of the syllabus, course often does not follow the syllabus

4. Professional development of trainers

Most what K. has learned was by working together with very good trainers. The theoretical concepts learned in college are good when talking to other educationalist for justification, but the real learning took place through the cooperation.

The exchange with other professionals does happen informally, in the office, when meeting each other, K. is not a member of any professional association. The informal exchange takes place e.g. by sending around emails "Look what I have made", lots of informal encouragement is given in IT TRAINING.

As a management director of IT TRAINING, K. will take most of the responsibility to learn things that are new to the training portfolio. He will design the course so that every other employed trainer can than use the course.

The extra learning is sometimes set on the bill for the client but in general a high amount of self-learning is expected from trainers in IT TRAINING. Usually, the work day includes 6 hour training per day, so there is not much extra time for professional development left.

K. emphasizes the informal aspect in the professional development of trainers. "Everything is learning. Every time you deliver training, it is learning, everytime you are creating a system, it is learning, it is build into the job".

He tried to establish a tool to reflect the learning within IT TRAINING, but stopped it because trainers then started to write reports about what they have learned and wasted time they could spend on learning.

The continuous professional development is so much part of the professional identity as a trainer and as an IT expert he suggested an unemployed Plummer on his course in Web design to find another profession because he could not see that this person will at least buy himself a Web design magazine.

Surprisingly, he referred to books as his preferred medium for learning something new.

Additionally the excellent relationships with their client organisations bring in direct feedback on the work and enhance the professional development.

5. Training practices

Context

CONSULT Partners has changed their training practice radically. 3 years ago an economic crisis hit the company, training budget was cut down. Before new people got training whether they needed it or not, now is automatic training does not happen any longer. For two reasons:

a) it is not cost effective, b) people get fed up with training. New people will now get a 2 days introduction by going around for a couple of hours in different parts of company. Somebody will then assess training needs (do you know office products, can you check your emails?). So CONSULT Partners will provide training in case training is needed. People have to come to G. saying: I got a problem there, then G. will start looking for other persons with a similar problem and organize a course for them.

The IT training takes place in a constantly changing environment. There exist no regulation of becoming a trainer; there is a lot of very cheap training offered on the market, sometimes because it is EU funded. Competition with cheaper companies is an issue: every 1 or 2 year, IT TRAINING is losing clients because they lose the tender for the IT training. It then happens very often, that the staff will go directly to the HR department and book a course with IT TRAINING. So in fact the client base is somewhat stable. K. gains his customers through reputation, IT TRAINING never invested into marketing so in fact those cheap competitors and new start ups do not longer effect the core business.

Problem A

Existing training is often very much school-based with no relation to the work. Like the example G. described: A new system was bought, he got an SQL-introduction with 3 other people. He came out and were panicked at the end of the day, did not use the knowledge for 9 month, everything was forgotten. The knowledge taught in the course was pure technical: how to write a report, but no knowledge about: how to start, from which sources which data is available.

Innovation A

K. was brought in to help G. with setting up the reports. K. did not set up the report by himself, but helped G. by thinking with him the steps to set up a report through and through. The knowledge taught 9 month before was now applied. G. then applied it various times, the understanding came with the practical application. "I need practical training, not to sit there." In this way, G. is nowadays trained quite regularly from K.: G. does not have any longer time to go on a 1-day-course, but if he needs something, K. will come over and guide him to the solution. Or, in another way: when K. is providing a software solution for CONSULT Partners, G. will have a look how K. is doing this, will get some explanations from K. and learn in this way by looking over K.'s shoulder.

Innovation B

When a classic IT course will take place, IT TRAINING will offer a free telephone support hotline, where people can call when they encounter problems in their day-to-day work. This support hotline is also a good instrument for evaluation, if there is frequent use of the hotline, something has to be wrong with the course.

Problem B

The need for basic IT training is declining. 3 years ago there were still people on training course who did not know anything but now everybody knows a bit (writing a letter, printing, surfing the net, checking emails). Also the software has not changed much (or not in a better way, so companies will not upgrade their systems). There are still some companies where people on the shop-floor-level lack basic IT skills. But these companies often refuse an offer for IT training, because they fear the professional progress of their employees. If IT training takes place on the shopfloor-level, it is in no way accredited training. The risk to lose people by qualifying them seems to high for those companies.

Innovation C

IT training is still undertaken by IT TRAINING, but not any longer in terms of general IT training. E. g. excel training is provided specifically designed for a person that has to handle dangerous drugs and chemicals like LSD.

There is shift towards customer-based training. The training now offered is problem-oriented, the client has a certain problem and K. will guide him through. “What I do is training, we facilitate learning, I do not teach. I show you something, but I have not taught you anything new, sometimes I have to teach a small concept (like calculating percentage in real), but generally this is very small”.

CONSULT Partners is doing IT training only on an ad-hoc-basis.

6. Diversity

No diversity aspects were directly or indirectly addressed within the interview.

7. Trends

E-learning has not cost IT TRAINING any client, health and safety can be taught with e-learning whereas IT problem-based courses not. Because the trainer is needed for the speed, in fact, any kind of answer can be found, but it is the speed to gain the answer that comes with the trainer. An additional reason is that people like being on a course, they like to meet other people.

The trend towards user-friendly software is also a threat to IT training: CONSULT Partners are bringing in new systems that are SMS based. K. stated that the better a system fits into the business processes; the less is need for training. The decline in IT training has also brought a shift to K. work profile. Now, he is employed more and more as a software engineer than as a trainer. CONSULT Partners hires him for the technical solution instead for a course. For example a new easy-to-use software solution will be developed by K. because it is easier / cost-effective to build a new software than training a large amount of people to use a technical complicated system.

2.2. Community Development, UK - Wales

1. Introduction

Project and goal

The case is based on a community development programme. The project was funded by the regional government to empower the local rural communities and to reduce poverty in the rural areas. The aim was to empower people at the community level, give them a voice, engage them in active participation. The former training programme was running out, the funding was reduced. Therefore F. shifted to another position, he is now organising 6 pilot projects of apprenticeship for community regeneration, starting to help trainers to work with local people.

The case description is based on the first community project about empowerment. F. regrets the cut down in cost, he thinks that there is still plenty to do in the field and left partly because with the rest of the funding he would not be able to provide the needed training to the communities.

The success of the project is obvious: Communities have changed, become more empowered with more confidence. The learning needs have changed as well, 5 years ago people from the community wanted to know how to be a committee, how to become a manager, now they want to know how to manage a budget, how to set up a social entrepreneurship. But F. thinks that basic training like confidence building is still needed.

Target of the training programme are people working in the communities. This is not limited to official positions but includes also people who are engaged in their community on a voluntary basis. In general people who form a community group, hold local positions, running charities community business or are employed by the community.

Number of interviews + function of the interviewees

F. organised the training for the community programme. F., has been in the army for 18 years as a soldier, started with the age of 21-22 delivering training within the army. He has lectured in technical training, survival skills, and leadership (principle / theories), planning events, team dynamics, motivational theory. Left the army in 1993 and converted this qualification in recognised civil qualifications. He started to work for an agency who helps young people to find a job, than switched to the community program. After the community program was running out, he went back to university to get a better education in vocational training.

His work as a trainer includes

- Helping people to find work
- Helping communities to improve
- Leadership principles in all aspects

J. from TRAINING COMPANY worked as a trainer within the programme. Her career is similar to the career of the trainer in the health-service sector case study: we can see a development from teacher in formal educational system to a trainer in more vocational / HRD aspects in adult education. She holds a degree in architectur. Before 1973 no formal educational degree was needed to enter the school-service. She started to teach in secondary school math and physics because of a shortness of math teacher. She concentrated on working with “problematic” kids, afterwards started to train teachers how to deal with this type of kids. Additionally she worked in a scout association and became a trainer in the organisation for other trainers. A local authority set up a training program for voluntary organisations, J. became employed by them. Set up TRAINING COMPANY in 1997. Her training areas include

- Evaluation
- Quality insurance
- Benchmarking
- Transaction anaylsis
- Leadership training
- Group facilitator skills
- Teacher training

She works primarily for the public or NGO sector.

The trainee interview is missing yet. Since the programme has been closed, the trainer is not any longer in contact with the trainees. She referred to F. as one of her trainees, but F. insisted on taking part only as an observer.

2. Company profile

Structure

TRAINING COMPANY training company started in 1997 that was set up as a research and development center on a non-profit basis. Focus was on research and on evaluation, but the portfolio shifted over the years more and more to training.

Location (factors)

TRAINING COMPANY is based in South Britain, the training is done on regional, national and international level.

Number of employees

3 people work fulltime with around 10 additional persons as freelancer.

3. Competences of a trainer

J. emphasized that the content of the training does not really matter; the pedagogic skills are the most important.

Language skill is considered to be the biggest single skill of a trainer, being able to reword the meaning of the sentence for the 4th time without repeating yourself, additionally active listening skills are necessary.

The ability to analyze and synthesize information really fast, looking at a big and dispart data set and very quickly to make sense of it, analyse it, categorize it.

Training is also a performance.

J. emphasize that values, attitudes are more important than skills: *“You have 100% be interested and motivated by people learning things”*, e. g. sometimes trainer are holding something back from people, because they want to be better, or they will not give away material. *“Without values it is only performance”*.

Additionally a self-awareness is needed: to know which type of learner / person a trainer is (concrete or abstract) to be able to understand trainees with different needs than oneself.

This is supported by F. who mentioned that a good trainer is someone who can easily relate to the way learners learn, who adapts his methods to fit those learners needs.

The real craft of a trainer is to maintain the interest of the learner, to pitch a subject, to act, to entertain. And to make people think and give them opportunities to learn. Also integrate the experience of the people into it because people value to learn from themselves.

Core skills are

1. Constant reflection whether you, as a trainer, meet the needs

4. Professional development of trainers

She refuses to take part on a qualification course *“because the possession of such certificate would work against me”* *“If I would undergo this process, collect some certificates, it would detract my market ability, because what they expect are trainers to be professional, but also not to follow the crowd”*.

For her own professional development she does a lot of reading, takes on work which she does not know anything about it.

The internet is a good source to learn about new developments.

And the learning takes place by:

- Trial and error
- Looking at other trainers
- Working together with other trainers.

The last fact seems very important. She is working sometimes together with Tim, trainer from the health foundation case study, and both reported that they will give each other extensive minute by minute feedback / coaching about the performed session.

J. mentioned that time and money hinder trainers at their professional development, the availability, opportunity and accessibility of workshops / seminars because of lack of money, time, long distance.

She is also missing the opportunity to experiment, to try something new which is, in her opinion, the biggest professional development need. E. g. Test a new training idea for a certain type of target group where she has no access to it.

F. emphasized the importance of a certain code of conduct for trainers. At the moment, everybody can call himself a trainer, *“but qualification does not mean anything, it means that you can pass a course”*. Anticipation skills are the one needed the most. His idea of a code of conduct (code of practice, as he also called it) is similar with J. notion of the values that are the most important for being a trainer.

But in contrast to J. personal identity as professional which leads to a refusal of standardization and certification, F. mentioned that the whole training field should be professionalised, certain training should be endorsed to meet standards. On the other hand he sees also the danger in accreditation because a certificate only shows that this person has passed the course.

He sees most obstacles in the professional development of trainers in money and in the attitude: a development implies that something is wrong with the training delivered.

5. Training practices

Context

The training for the “Community first” – programme is divided into two parts: a small training budget was administrated by F., the communities themselves had a bigger budget for development, which could be used for everything (learning, training, Christmas parties).

In contrast to the other case descriptions, external regulations were strong because of the funding aspect. The monitoring took place not on quality of training delivered but how money was spent. A common inspection framework with 5 questions was applied with a portfolio of evidence. The budget was reduced dramatically over time, only a quarter was left.

For the “Community first” – programme, F. could set up any kind of training as long as it would have met training needs.

Problem A

The training is taking place in a very sensitive area which effects power relations within the community. People who have held a position for over years within a community are challenged through the programme in two ways:

- They are supposed to go on a training course, which implicitly implies that they have a deficiency in a certain area. The self-awareness about this deficiency is very low because this type of people is performing their job / position over years and never has been confronted with ideas about self-development.
- Their position within the community is now challenged by other people that are getting trained on the programme.

The programme had to deal with a lot of reluctance from the trainee’s side; people did not want to be on the course, did not showed up.

Additionally the training that was offered was free therefore it had no value to the people. The target group was one who did not value training (people from remote impoverished communities). F. tried to bring a booking fee in it, but the administrative cost were too high. The only solution was to talk to the co-ordinators of this local training, asking them to bring the people they have listed for the training to the course.

Problem B

In public / voluntary sector training basic skill training is needed. There is a huge problem with basic skills deficiency in Wales and in UK, people have developed coping mechanism, but for example if you are writing something down on the flipchart, maybe only have of the class can understand this.

Innovation A

On the “Community First” programme there was a strong aspect of mentoring in it. The learning took place informally, through observation of behaviour. The mentor would guide the mentee through, making suggestions for courses etc.

Within the interaction of the mentor, the community programme leader developed the training offers. Mentees makes suggestion for their training needs, mentor guide this way. In this way people have the ownership about their learning way. “*It was rather a journey of opportunities than learn this learn that*”.

F. contacted each community coordinator in advance, asking them for their training needs according to the strategy, to the mentor’s feedback. He than created a list out of this responses send out the list again, asking which they want to attend, then selecting the most popular out of it because of limited budget.

Accreditation training was part of the budget of the community training budget, he was not offering any kind of accredited training.

Innovation B

The project was confronted with the problem how to select trainers for the programme. In this field of empowerment a lot of people are working.

First an advertisement was put in the newspaper asking for CVs and two references. F. would take part in one course to observe the way a trainer run the course. Also he was looking for experts with national reputation. So the pool of trainers has been reduced from 75 to 15.

The lesson learned from this experience is that F. would not any longer rely on CVs and written documents, the personal judgment about how trainers perform became more valuable.

Problem C

The way of the funding is a problem. More and more, funded training has to be done according to RARPA principles that try to assess the quality of training. A training according to RARPA principles assess the needs in the start, set up goals, and use formative and summative assessment to evaluate the training. But this principle only work for college education, for 12-week-courses and not one day course where there is no time for testing. And again: with a test at the end, half of the people will not show up.

Innovation C

F. created an informal “learning logbook” which comprised of a booklet of 30 pages. The pages where identical the front page contained information about the training event (date,

subject, venue) and a little box “What I have learned from this event”. On the back of the page a 3 or 6 month evaluation was done by asking questions about how the outlook has changed.

6. Diversity

The remoteness and poverty in these rural areas have let to the programme but are still influencing the training (see problems above). The accessibility of the training venues has been very problematic in rural area. Public transport does not really work therefore it was problematic for trainer and trainee to access the venue. The remote living of a trainer is also a problem for his / her professional development.

7. Trends

The funding changed from capacity building to social entrepreneurship, but F. sees that communities are not always ready for social entrepreneurship, they still need capacity building.

The shift in the funding will be more targeted in the future, less but bigger projects will be financed and that will leave the less developed communities behind.

The consequences for the training are enormous: training will be more restricted, it will be more fixed what to put on the training programme and less need-orientated.

Over the last years he think that more and more people see training as a job, so they are not longer willing to explore other points brought up by trainees, but this is the core point where the learning begins.

2.3. Health Charity - UK

1. Introduction

3 interviews have been done:

T. is a consultant / trainer for the training scheme. He works for for UN, national health campaign, public and private sector, mainly UN and national health campaign. He trains a huge range of things, for the UN e. g. facilitation of project management. He helps people learn “in terms of enabling them to learn from each other” (2:00-2:15). Therefore he does not regard himself as a trainer, but uses the term coach or consultant for his work. Expression of coach: real-time learning for practitioners, T. has given up the expression of real-time-learning, but the notion of immediate application is still important for him to describe his work. He was involved in traditional training as teacher but is trying not to get involved into it

any more. He holds a degree in history, than one-year post-graduated training education, within this year, almost only practical training, no theory. He has than done a classical teacher career worked in elementary school, in higher education, VET and in private industry. He does not want to become involved any longer in this classical educational system. He also has taught other teachers. After 20 years in business after 20years in business, he runs his own company since almost 17 years. He is specialised in working with teams, doing team development in traditional way or combined with unusual things like bread baking. A change in interested: traditional educational way of working in Vet is with individuals, now he is working with teams, because it is more likely that the taught things will be applied by teams, he also puts into the contract that he will work in the work context with them, helping them to apply what has been learned afterwards and to come to this agreement it is also easier when working with teams (19:20-19:47).

M. is responsible for the training organisation in the HEALTH CHARITY. She moved from Simbabwe in 1989 with an undergraduate degree in psychology, than did a master occupational / organisational psychology, tried out to become a consultant, than joined HEALTH CHARITY in 2001 as a project manager, office manager, since 2004 actual position.

A. works for a primary care trust for acute services in London. She has been trained as nurse and psychotherapist, worked in community work, nursing, moved into primary care trust 4/5 years ago. The aim of her position was to improve access to general medicine, make sure that people get faster an appointment. So she holds an operational position to improve the quality of service within her organisation. Her current position deals with long-term conditions, chronic diseases. The aim is still similar: improving service but also to reorganise structure asking what can be moved from hospital to community, increasing capacity of community to take care for chronic disease. She holds this position since 2 years and her job profile describes her as a change agent within the organisation. She came to the training scheme through the annual revision. She and her supervisor were aware that A. is working below her capacity because A. is not personally ambiguous, identified that some training with leadership would be good for her. She applied for scheme because there is a link back to the organisation, that is different to other schemes, that scheme will benefit organisation as well as A. personally and it is free, it is hard in the current climate to get resources. Her first seminars started in 2007.

2. Training scheme profile

The HEALTH CHARITY is a very wealthy charity organisation with the aim to improve the quality of the Health sector in the UK. The current training schemes are quite ambitious: Their aim is to change the whole Health service sector to improve the quality of the service for the patient.

The HEALTH CHARITY is completely independent. Only controlled by a board with the aim to link in what is going on in the policy for the health care sector. Training itself is highly valued in the HEALTH CHARITY. Every person employed by the organisation has an individual budget for training.

The researched training scheme is called the “fellow leadership” programme and is aiming to improve the leadership qualities of participants in service for a better patient-health care –relationship. The training scheme runs for 12 years with 6 cohorts, starting every second year in October with 16 participants.

To get on board the selection process is quite strict:

- a formal application must be provided, additional support by line manager and chief executive of organization. 4 program manager looking through the applications, written report for each application with a score. 30 people (this year from 86) selected through leading program manager M. and J.
- 2 online questionnaires to fill in by this 30 people
- 2 days assessment center with verbal reasoning skills, competence based interview looking at intellectual flexibility, group communication, holding into account etc. The assessment center is run by trainers from the pool, decision are done by assistance director Jen, M., and 3 of the trainers.
- Choosing 16 people, not the best but to get a mix of qualifications / positions, gender, ethnicity, geographical distribution

Program managers will be trained for the selection process, also one day of preparation before the assessment centre starts. The training scheme is half done now; there will take a strategic review soon. The training scheme does not lead to any formal qualification (even though very often people ask about it). It is well known with a high reputation.

Persons involved in training scheme

The HEALTH CHARITY is located in London, their training scheme is offered through all UK, seeking a geographical diversity of the participants. Each training scheme is supported from the HEALTH CHARITY with a programme manager. T. as an external trainer will train these people to be prepared for the selection process.

The HEALTH CHARITY is keeping a pool of 13 trainers / consultants, they have started with 10 and integrated 3 more for ethnic minority group. M. from the HEALTH CHARITY emphasize even though that all the trainers are independent consultants, they work very well as a team.

Structure of training scheme

Each training scheme is run with 2 trainers, in this case: man and woman. The training scheme holds varies aspects of training.

- 2 days per month have to be assigned to the training scheme. Every second month there is a seminar for 2 days. 1st day is an action-learning set (see point 5 training practice), second day a seminar with 4 invited speakers with literature to prepare in advance. The speakers are limited to a talk of 20 minutes each. This structure of seminare is a consequence of the experiences within the pilot project. In the pilot project a master class was set up with people lecturing but the acceptance was low.
- Additionally in some workshops patients are invited to participate.
- Each month 2 hours are assigned for coaching sessions (see point 5).

Each participant will set up their own success criteria in the beginning. This is already done with the application, but will be concretised with the help of the coach. Also the aim is to develop an individual 360 degree feedback template. At the end participants will write a report about their achievements, so a self-evaluative approach has been choosen.

3. Competences of a trainer

Selection procedure for trainers

It was not an open selection procedure. Existing networks were used, the recommended trainers were contacted to send CV, references as well as to answer certain questions related team building processes and health sector had to be answered. Invited trainers to do an interview and to perform a facilitation process. M. and her boss were doing the interview with additional support from independent trainer, the evaluation of the facilitation process was also done through an external consultant.

The decision to create a pool of trainers resulted from the pilot project. The pilot project was done with 2 trainers responsible for several training schemes. The problem was the relationship of the HEALTH CHARITY to the trainers. Since it is a long term contract

trainers felt like it was their training scheme, conflict developed because HEALTH CHARITY thought of loosing control over the program.

A good trainer

For M., organisor of training:

- being a good facilitator.
- Allows people to learn from themselves and from others,
- responses to what is going on

For A., participant:

- *“The skill of a good trainer is within their facilitation and in bringing safety to the learning space where everybody can contribute to”* ;
- to value what each participant bring into the scheme: *“the skill of a trainer is to keep as much as possible an equality”* between trainer and trainee,
- having and understanding what is going on in the health sector
- empathy
- critical thinking
- holding the group to task

For T., trainer

- regards himself as facilitator
- three skill sets: group processes, one-to-one coaching, evaluation
- helps people learn in terms of enabling them to learn from each other, helping them that people can think through a problem.

4. Professional development of trainers

Support provided/facilitated by the company

The HEALTH CHARITY has created 4 development days per year, where they pay the trainers to take part. Day consists of 2 parts: first: informing trainers what is going on in the HEALTH CHARITY (new training scheme etc). than 2 input speakers e.g. about communication in health section. In the afternoon split into 2 groups with action learning sets: each trainer is giving a brief update about their work, than an action learning set about certain problems is done.

Informal learning

Feedback from peers is the main resource for professional development. Because a greater portion is co-work, planning and reviewing the work of each other takes place, also co-coaching each other.

One-to-one-coaching

T. gets regular one-to-one coaching.

Learning instruments

Reading books, websites, action-learning-set within the British association for action-learning

Relevant learning experiences according to the trainers

A very direct learning comes from direct feedback. Experimentation, getting copies from colleagues about new craft-skills, trying them out, phrases a trainer can use etc. Another form is trying to get people in the same room together and to talk, to share ideas.

Conferences are regarded less effective.

Ideal situation regarding professional development

Long blocs of 3-5 days where trainers are gathering. Give them an input. Give them chance to design short sessions. Then facilitate feedback from the other trainers. Build high-level-thinking in but attach it to practice so people not only get ideas but get the chance to practice them and experiment with them. It is an uncomfortable situation, but this is where you learn most. "A lot of professional development that we do is very comfortable". "Somebody said 'if you only have a hammer, you treat everything as a nail', most HRD professionals only have a hammer, so everything must be treated in the topic of a course'.

5. Training practices

Practice

– Action-learning-set

The work distribution between the two trainers is as follows: The 16 participants are split into 2 groups, the one trainer who will lead the action learning set will be the coach for the other 8 participants of the other group.

E.g. for action-learning set: Starts with a round what the major things / issues are. Then trainer decides what issues to be addressed in this setting, the action-learning set will be facilitated by one of the participant. So everybody gets the chance to facilitate the issue from another person. Through this, participants learn to apply a variety of tools and techniques (already known or currently learned in the workshop). The action-learning set is accompanied by 2 note takers, one for the person whose issue is addressed, one for the facilitator. People own these notes afterwards. The action-learning set always finish with "what next", bringing

persons to say what the next step is not only tackling an issue. The next action learning set starts with feedback from person whose issues were tackled.

– Coaching

The coaching is done every month for 2 hours. As a beginning trainer provide a template with topics like: issues, decisions from last session, current situation, things to do /to ask from people/ aim of this session

Trainee has to make clear what he / she wants from the coaching session. A.: *“It forces to step back from daily work. It feels like a luxury to have this”*.

The support of the trainer is not limited to the 2 hours: When a decision is to make (e. g. A. works at the development of a self-care strategy), T. as her coach is providing her with material, suggesting some project format cycle to use and offers additional support via telephone to speak this through.

– Informal learning

Trainers encourage informal learning, e.g. participants have set up book groups to review, a lot of informal communication is going on e.g. one sends around documents, T. is creating a summary. of the material. If trainers have an idea for informal learning, they also communicate it to the HEALTH CHARITY. As a reaction the HEALTH CHARITY will set up a new website with extranet to enable this informal communication process.

– Mentoring

Each participant has to choose a mentor as well, trainers help with action-learning-set and coaching in the decision making process

Problems

Confidentiality. Coaching is a process build on confidentiality, but the HEALTH CHARITY wants to know what is going on in the coaching. Has not become a problem but it is a sensible area. The HEALTH CHARITY has made clear that her interest is in themes, time frames but not in detailed problems.

The training takes place in a situation of (constant) restructures of the health care sector. One of the major changes took place in the last 2 years, where people have to apply for their old job again and a constant threat to their jobs was created. Therefore the training scheme could not evolve as expected. With the acceptance of the HEALTH CHARITY the trainers helped participants to survive this difficult situation by preparing them for job interviews etc.

Innovations

An additional position was created: an independent trainer (female) who is now linking the HEALTH CHARITY with the trainers. Position has developed, she was taking part from the beginning during the pilot phase, has helped to sketch the training scheme. She has helped to select the trainers, accompanies and assess the ongoing work. Position is well accepted and used by the trainers. She uses a quality insurance framework that looks at various competences of the trainers (respond in a timely way, understands the wider context, understands teambuilding etc.). She conducts interviews with each trainer, observes how trainers work in their action-learning set e.g. All this material feeds into an annual written report about each trainer which are discussed with M. and assistant director B. This will lead to recommendations to the trainer for their professional development (read book X about health issue, diversity issue etc.). Some of the issues will be integrated into the 4 days development workshop of the trainers as well.

The training scheme is conducted by two trainers. The training role is split into one who is responsible for the action-learning-set and one who is responsible for the coaching of the person who takes part within the training scheme. This has the clear advantage that the trainee can get a second opinion on an issue that might have already been raised during the action-learning-set.

A big emphasize is to link the training back to work practice and to stimulate an organisational / cultural change. During the pilot, it was not clear for the participants that their training is related to institutional change. It was conceptualized as an individual training course with the underlying assumption that this will implicitly improve the quality of service for the patient. Now this is made explicit, that every learning has to be done in favour to improve the service for the patient. Thus patients are invited to the workshop. The link back to the work is also stressed by side visits from the HEALTH CHARITY at the beginning of the scheme. Also line managers and executive managers are invited to the first work shop and have to write a report at the end of the training scheme.

Evaluation of Training practice

During the workshop there will be one person from the HEALTH CHARITY to stay for a day. There will be talk to the trainees in the evening so they can report back what they have already learned. A written report on the training scheme days will be created which is also shared with the trainers so that they know what is reported back. Trainers also report back to HEALTH CHARITY about the results from the action learning set.

6. Diversity

The diversity aspect is truly embedded into the training scheme: the create a diversity among the participants of the training scheme is one major goal of the selection process. Also the team of trainers is highly diverse, increased in numbers from 10 to 13 due to ethnic minority issues.

7. Trends

There are several disadvantages of normal training situation that creates very limited value

- 1) *”Most training assumes that there is a gap of knowledge and filling that gap is a pointless exercise, I can move from incompetence to mediocracy, but it cost far less effort to take that things I am good in it and move them to become excellent, so normal training is based on the wrong model, it is based on a deficiency model” (T.)*
- 2) *“It is away from work context, HRD people pay to get people into a classroom and afterwards, the knowledge will be used or not, but everybody comes from a different work culture even within the same company, and what is taught in the course might be from another different culture” (T.)*

Growing recognition within the UK that the mixture of group learning and coaching and projects is spreading. Movement from management training to leadership training. The difference is that leadership is about human relations, management is about the wider technology of management.

What has changed is a shift out of the academics, education is concerned with formal qualifications and certifications, but not with learning. Europe is still focused on academics but it is important to free up the idea of learning from the institutions, recommends T.

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