

## **A CASE STUDY OF EMPOWERMENT: LINKING ADULT TRAINING TO EMPLOYMENT THROUGH INNOVATIVE LEARNING APPROACHES**

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### **ABSTRACT**

*The aim of this 10-workshop based case study project paper is to prepare a customized personal development plan, an action plan including; short-term, mid-term and long-term goals for 3 women learners from diverse backgrounds, on a 'Status of Women Canada' funded project titled: 'Empowerment'. The case study is focussed on aligning learners to their professions either through self-employment or through employment within the government, non-profit or the private sectors. The learners' comprehension-level learning objectives and their application-level learning objectives were facilitated. Data was analyzed using SWOT, Needs and Functional Job Analysis. Principles of Adult Training, Needs Analysis, Presentation / Facilitation and Evaluation formed the competencies' framework for carrying out the assessment. Based on initial needs analysis conducted, learners were assessed. The case study project proceeded as per standards laid out by the Ontario Institute of Studies in Education of University of Toronto's training guidelines. This case study project led to all 3 women gaining meaningful employment in their field of education and training within 6 months of the project's initiation and stands as a testament to the highly successful innovative techniques that were employed, which enabled all 3 learners employability, contributing to the project's 100% success. This paper is a reflection on the problems identified, the context within which this occurred, the purpose of the project, the project information related to it, the methodology used and findings.*

**KeyWords:** Personal Development Plan, Action Plan, Goal Setting, Empowerment, Adult Training, Need Analysis, Facilitation and Education

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## **1. A background of the institution(s)involved**

This was a ‘Leaders in Residence’ project titled ‘Empowerment’ funded by ‘Status of Women Canada’ and supported by ‘Skills for Change’ (SfC) a not-for-profit organization based in Toronto, Canada. The project followed University of Toronto’s Ontario Institute of Studies in Education standards of evidence-based evaluation related to the collection, analysis and reporting of data.

This 10-workshop based project was a unique opportunity to integrate and apply skills and knowledge gained including prior experiences, knowledge and key competencies related to adult training and development principles. The reason for selecting all 5 modules of Adult Training, Needs Assessment, Instructional Design, Facilitation and Presentation for this project, was to make use of this unique opportunity to apply their individual competencies to seamlessly integrate and blend them to train adults in a different environment, focused at achieving different learning goals for them.

## **2 The context for the case study / best practice- trends it addresses, the problem and the reason why the initiative was undertaken**

### **2.1 Description of the context**

The aim of the project was to support 3 women immigrants (35 to 55 years) most in need of help, unemployed or underemployed and / or at risk of violence; get from a situation of dependence to a situation of self-employment or a job. This project worked on customized goals for each woman based on individualized needs assessment, leading to all 3 women on a path to their empowerment by enabling them gain meaningful self-employment / sustainable employment. 10 workshops were conducted as a part of this project from October 2013 to April 2014, which forms the basis of this article.

#### **2.1.1 The target group**

- 2-3 new women immigrants out of whom 1-2 facing an abusive environment were identified to be a part of the learning group for this project; a total of 3 learners.

- This target group was identified based on their commitment to work regularly on the project for the specified duration of the project period or until their goal on the project could be achieved/ whichever was earlier.

## **2.2 Statement of the problem /task**

The problem addressed in the case study was the lack of employment in the field of expertise matching specific skill sets of all 3-immigrant women learners.

### **2.2.1 The task**

- To evaluate current skill sets of the 3 immigrant women.
- To conduct needs analysis and ascertain current training gaps of these women.
- To prepare a customized personal development plan, an action-plan document, short-term, mid-term and long-term goals for each of the woman, to help focus on their current strengths.
- To help align these women to jobs within their key areas of expertise.

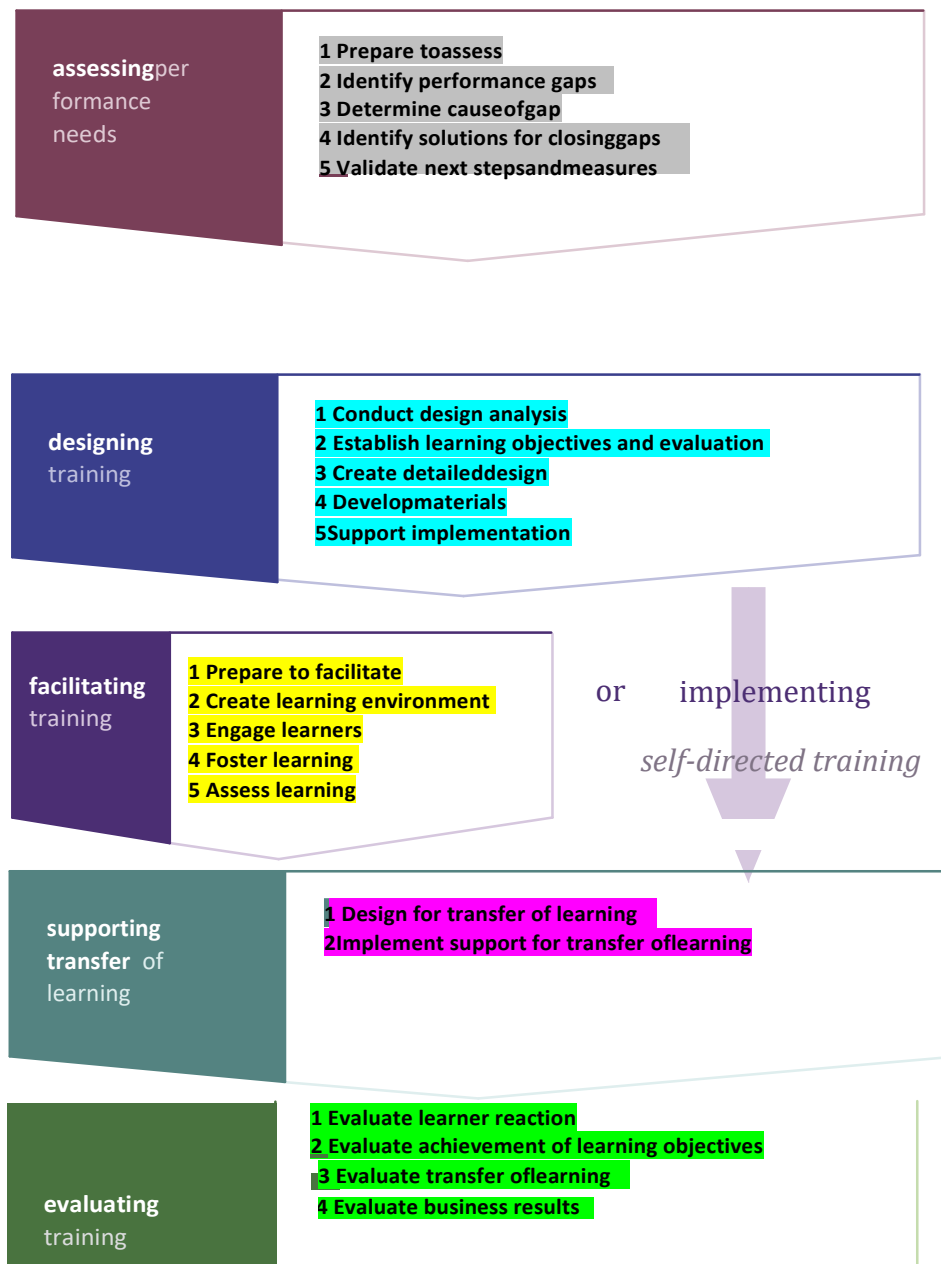
## **2.3 Best practices / trends it addresses**

The Canadian Society for Training and Development (CSTD) in its framework ‘*Competencies for Training and Development Professionals*’ lays out Competencies for training and developing professionals for assessing performance needs (pp.17- 28), designing training (pp.31-44), facilitating training (47-58), supporting transfer of learning (pp.61-66) and evaluating training (pp.69-80).

### **2.3.1 Conceptual framework**

This paper uses the conceptual framework laid out here below:

#### **Figure: CSTD Framework**



The American Society for Training and Development (ASTD) also created a competency model as a guide. The model includes “*competencies of designing learning, improving human performance, delivering training, measuring and evaluating, facilitating change, managing the learning function, coaching, managing knowledge, career planning and talent management, and roles, and is a frame of reference for career growth and professional development*” (ASTD, pp.1).

Regarding need analysis, it has been stated, “Task Analysis is a Training Need Analysis (TNA) technique that derives optimals attached to visible tasks” (Rosett, A. pp. 8, para.4). Barbazette, J. (2006, pp.1) in her book *Training Needs Assessment, Methods, Tools and Techniques*, demonstrates “the essentials of needs analysis from the emerging trainer's perspective.” She throws light on “when and how to do a training needs analysis, using informal and formal analysis techniques; goal, task and population analysis and, how to develop and present a training plan.” “The challenge is to find the problem understand it sufficiently so that it can be solved” (Rosett, 1987, pp. 8, para.4). Gupta, K. (2006, pp.1) shows how to “manage and report a needs assessment project and access professional ethical guidelines”.

On the importance of setting objectives, many affirm, “working from goals and strategies, training strategies are planned and developed” (Rosett, 1987, pp. 10, para.2). Russo, C. (2008, pp.36, para.1) states, “objectives are based on clearly defined needs, derived from careful analysis of the problem, opportunity, or requirement that led to the project or program”. As stated by Kirkpatrick, D. and Kirkpatrick, J., (2006, pp. 9, para.1-2), “*once the needs have been determined, it is necessary to set objectives. Objectives should be set for three different aspects of the program in the following order: What results are we trying to accomplish? What behaviors are needed to accomplish these desired results? What knowledge, skills, and attitudes are necessary to achieve the desired behaviors?*” Russo (2008, pp. 5, para.4) highlighted that “objectives are powerful in that they provide direction, focus and guidance and create interest, commitment, expectations and satisfaction.” Russo (2008, pp. 17, para.3) further states that, “the highest level of objectives comes from analysis of need” and, that “Learning objectives are based on learning needs” (Russo, 2008, pp.32,para.4).

With relevance to design, Bloom’s revised framework explores curriculums from three unique perspectives “cognitive psychologists (learning emphasis), curriculum specialists and teacher educators (C&I emphasis), and measurement and assessment experts (assessment emphasis).” “Design of training should be based on desired performance outcomes.” (CSTD Competencies Framework, pp. 31, para.6) “If the problem is one that can be solved through training then instructional designers will establish clear training intentions.” (Rosett, pp. 8-10) Colvin, C (2010,pp.6, para.2) shows “how to maximize learning through visuals and words, apply

examples and practice to strengthen instructional methods.” “Implementation is trying out training solutions developed” (Rosett, pp.10,para.3).

About presentation Durate, N. (2008, pp.4) states ‘presentations to often reflect the agenda of the presenter’ “True presentations focus on the presenter and the visionary ideas and concepts they want to communicate (Durate, pp.4, para.3). He (pp.14, para1) also adds “before beginning a presentation, it is important to ask yourself questions about your audience – who they are? What are their needs and how you can address them?” “Multimedia environments, including online presentations, lessons, simulation games, slide shows pay a crucial role in education”(Mayer,R,2005,pp.1).“Graphicsgotbetterratingsthanlessonsacking

visuals, even though only the relevant graphics led to better learning” (Colvin, 2010, pp.12, para.2).

Malcolm, Knowles in his book ‘*The Modern Practice of Adult Education*’, while “focusing on the notion of informal education, points to the ‘friendly and informal climate’ in many adult learning situations, the flexibility of the process, the use of experience, and the enthusiasm and commitment of participants including the teachers” (Malcolm, 1981, pp.1). Further “facilitating training can range in scope from a classroom with a few people, to a webinar with hundreds” (CSTD, pp.47, para.1). Barbazette, J (June, 2010) on learning and performance thinks “there needs to be a stronger focus on the proactive performance consulting approach to the training function.” Bloom, B. (1956, pp.98) recommends, “Stakeholder strategies to support performance.” CSTD (pp. 17, para.1) says “*assessing performance needs can range from a designer taking a few hours to clarify what learners should be able to do after training, to an experienced training and development professional taking weeks to conduct a needs assessment of a complex performance issue that involves many work processes, functions and roles.*” “The learning style myth leads to some very unproductive training approaches contrary to the modern evidence of what works. Engagement is essential; but it is psychological engagement rather than physical engagement that counts” (Colvin, 2010, pp.15, para.1). Tuckman, B., Bruce, J., and Mary J. (1977, p.419-427) proposed in ‘*Stages of Small Group Development Revisited: Group and Organizational Studies*’, “*a model of developmental stages for various group settings over*

*time, labeled (1) testing and dependence, (2) intragroup conflict, (3) development of group cohesion, and (4) functional role relatedness. The stages of task activity were labeled (1) orientation to task, (2) emotional response to task demands, (3) open exchange of relevant interpretations, and (4) emergence of solutions. The model now stands: forming, storming, norming, performing, and adjourning.”*

On transfer of learning, Mary (2005, pp.1) shows how to “find and engage stakeholders in transfer of learning efforts”. “Training primarily addresses skills and knowledge component of performance.” (CSTD, pp. 17, para.3) “Supporting transfer of learning involves designing and promoting activities and materials that help learners apply what they learned during training back in the workplace (CSTD, pp.61, para.1) CSTD. “If the trainees do not apply what they learned, the program has been a failure even if learning has taken place” (Kirkpatrick, 2005, pp.6, para.3).

Finally, Broad, M (2005, pp.138) speaks regarding the role of evaluators in supporting learning and performance. “Evaluation is, in fact, an ongoing process that starts with assessing performance needs, and continues through designing training, facilitating training and supporting transfer of learning” (CSTD, pp.69, para.2). “Training effectiveness depends on the intended learning outcome and the learners” (CSTD, pp.17, para.1). Kirkpatrick et.al, (2006, pp. 4, para.1) state that “if programs are going to be effective, they must meet the needs of participants.” Kirkpatrick (2005, pp. 5, para.1) further states that the “reactions of participants should be measured on all programs for two reasons: to let the participants know that trainers

value their reactions, and to measure their reactions and obtain suggestions for improvement.” Kirkpatrick (2005, pp.6, para.1) believes “learning evaluations should be targeted to the specific objectives of the program and should be used to evaluate all programs.” “Evaluation should be done only on those programs considered most important” (Kirkpatrick, 2005, pp.7, para.3). Rosett (1987, pp. 10, para.4) believes “evaluators seek data to judge the worth of the training effort.” He further goes to say, “extant data analysis is the effort training professionals make to ground front end analysis in performance and accomplishment” (Rosett, pp.27, para.3 and pp.48, para.2). Russo (2008, pp.9, para.6) also states that “these high level objectives pave the way for evaluation by providing the facts and details needed for the evaluator to collect and analyse results.”

✓ **The goals and outcomes intended to be achieved by the institution(s)**

Learning objectives were first established by assessing the intended and desired performance outcomes and are based on learners’ needs analysis. Based on which, application-level learning objectives and comprehension-level learning objectives were established.

**3.1 Application-level learning objectives:**

1. Expressing thoughts, and communicating orally and fluently in English
2. Creating a personal development and a goal focused action plan
3. Producing a professional portfolio to demonstrate organizational skills
4. Creating a plan based on prioritization of importance and urgency of tasks
5. Evaluating approaches to goal setting and reflecting on how to make improvements

**3.2 Comprehension-level learning objectives:**

1. Interpret the relationship between personal effectiveness and self-confidence;
2. Translate the relationship between being clear goal focused and being successful at achieving those goals
3. Develop and execute the knowledge one has successfully and confidently

Achievement of these learning objectives were evaluated during training, using tools such as



role-plays, case study, tests, etc. Based on gaps assessed, the following goals were selected for training of all 3 learners:

### **3.3 The final goal**

1. To complete the Empowerment case study project and achieve the goals of finding meaningful employment for the learners'
2. To achieve the learning outcomes for myself
3. To achieve the learning objectives set out for the learners at both - application and competency-levels

## **4 The actual implementation strategy**

### **4.1 Principles of adult training**

The specific modules and their underlying competencies from where the case-study project drew upon were as follows:

#### **4.1.1 Adults learn through reflecting on their and other's experience**

A reflective learner diary was introduced in the first workshop, which all learners were taught to maintain from the beginning and could read from it during the workshops whenever they wanted to share something important from it, of their reflections from the workshops and their experiences and learning, with others.

#### **4.1.2 Adults learn when content meets their perceived need**

The content developed was based on the needs analysis done for all 3 learners and the learning objectives derived from it. The activities were aligned to achieve key learning objective for all 3 learners at skill / application and knowledge / competency levels, meeting goals of adult learners of content meeting perceived needs.

#### **4.1.3 Adults are internally motivated to develop increased effectiveness**

These were focused at enabling and facilitating all 3 learners to bring their SMART goals and objectives to assess that they were internally motivated in order to increase their performance and effectiveness through activities 1 to 17.

#### **4.1.4 Adults filter their learning through their personal valuesystems**

Ground rules were set right at the beginning during the first workshop through a consensual approach, establishing the principle of valuing each learner's personal value system and recognizing this explicitly throughout the learning process.

#### **4.1.5 Adults learn optimally in informal environments**

The learning environment of the workshop was kept informal and friendly, yet disciplined enough for the learners to get effective based on the agenda that they followed for their learning.

### **4.2 Needanalysis**

Competencies that were used are as specified below:

#### **4.2.1 Identifying performance gaps–**

Knowing what results to achieve and how to evaluate those results based on key goals set for each learner at the very beginning was critical. Knowing at the start, the tasks / activities learners required to be engaged in; in order to achieve their desired performance outcomes was equally important. Learners' performance outcomes and their current gaps based on SWOT and KSAO analysis emerged as follows:

- a. **Learner 1**–Needed external help with some emotional aspects of life; required to build on more industry awareness; and needed confidence presenting to groups.
- b. **Learner 2** –Needed guidance to overcome weaknesses; to learn to become more clear and goal focused; to build personal effectiveness; needed financial understanding; required to build specific professional language skills; needed training to express thoughts clearly; required support to leverage project work experiences; needed to improve on oral communication skills & speaking and presenting to groups; needed more practice to use information and communication technology.
- c. **Learner 3** – Lacked Canadian job experience; needed to better leverage current knowledge; required to build more industry awareness; needed better financial understanding;

needed to learn to prioritize; needed to complete a task once initiated; needed to become better process oriented; needed to improve numeracy skills; needed to improve organizational skills; needed to build rapport with people and time management skills.

#### **4.2.2 Determining causes of performance gaps-**

Assessing pre-requisite knowledge, skills, abilities and other attributes (KSAO's) of these learners based on their earlier jobs from their previous organizations (as all learners' were currently unemployed), their performance gaps were assessed as follows:

a. **Learner 1**– Being 20 years in an abusive marriage, this learner lacked sufficient Canadian employment experience in the professional field of expertise and sufficient exposure to professional presentation opportunities and lack of required presentation skills.

b. **Learner 2** – Coming from a cultural background such as Hungary this learner was multi-talented and multi-focused yet lacked clear goal focus and confidence due to the cultural background. The learner also lacked financial understanding due to lack of an opportunity to work in this area specifically. Further, due to English not being

the first language in Hungary, the learner had weak communication skills also being less exposed to communication technology.

c. **Learner 3** – Not having a job in Canada was one of the reasons for the lack of utilization of professional knowledge for this learner and lack of appropriate transferable skills and industry awareness in the country of residence. The learner also lacked financial understanding due to a lack of opportunity to work with that skill specifically apart from a lack of prioritization and a lack of commitment to task- fulfillment due to a lack of organizational skills. Furthermore, this learner also lacked numeracy skills due to insufficient exposure to working with numbers; insufficient people management, relationship building and interpersonal skills.

#### **4.2.3 Identifying solutions for closing gaps–**

Non-training solutions for these learners' were not considered as they did not apply. Solutions for closing some of the performance gaps and supporting transfer of learning for all learners to a satisfactory extent considered were:

- a. First, to create an awareness of the existence of these gaps among all learners;
- b. Second, to get a buy-in from all learners for closing some of these gaps and to gain their commitment to do so;
- c. Third, create a plan by designing learning objectives both at the skill and competency levels and, design / choose suitable activities to achieve those objectives for the learners.
- d. Finally, implement the plan by facilitating those activities for the learners by designing / creating a learning environment enabling transfer of learning to take place thus achieving the goals for the learner/s.

## **Design**

### **4.3.1 Conducting a design analysis–**

To decide what tasks and activities these learners should be doing based on their intended performance outcomes, based just on who these learners were, their educational background, their job experiences etc.

### **4.3.2 Establishing learning objectives and evaluation–**

To establish the learning objectives by assessing the intended and desired performance outcomes based on their need analysis. Based on these, application-level learning objectives and the comprehension-level learning objectives are established to evaluate the achievement of the learning objectives during training.

### **4.3.3 Creating detailed design**

What is the best way to deliver training? (Classroom, virtual, e-learning etc.) What learning activities are required to achieve the learning objective? These were some of the questions that went into the design process. Classroom was decided as the best way to deliver training rather than virtual or eLearning, etc.

The timing for each activity was 20 to 30 minutes. Learning activities that were designed to facilitate and achieve the learning objectives included activities such as:

- Activity 1 – LearningExpectations
- Activity 2 – ReflectiveDiary
- Activity 3 – SWOT (Strengths, Weaknesses, Opportunities and Threats) Analysis
- Activity 4 – SkillsAudit-1
- Activity 5 – NeedAssessment-1
- Activity 6- NeedAssessment-2
- Activity 7- SkillsSpotting
- Activity 8 – SkillsAudit-2
- Activity 9- Discovering your CareerDNA
- Activity 10 – Priorities for PersonalDevelopment
- Activity 11 – Personal DevelopmentPlan
- Activity 12 – Aims andObjectives
- Activity 13 – SMART Goals (Specific, Measurable, Accurate, Reliable and Time Bound)
- Activity 14 – AchievementDates
- Activity 15 – Setting Timelines andMeasures
- Activity 16 – Success Criteria and ImplementationPlan
- Activity 17 – ActionPlan
- Activity – Demonstrating how to develop a professionalportfolio
- Resource Identified: *Goals Setting*article
- Resource Identified: *Personal Development Planning*article
- Resource Identified: *Personal and Professional Development*article

#### **4.3.4 Developing materials**

Care was taken in developing materials that the learners needed during training to support their learning and the material that was required by the facilitator to support the delivery of the training and evaluation of the learning objectives. Care was taken for preparing and printing them out and keeping them ready for the learners well before hand. The material used was based on well-projected content that suited the learning outcomes and validated the learner and the facilitator materials.

#### **4.3.5 Supporting implementation**

Care was taken of all other requirements such as printing, distribution and maintenance of materials. All printing was done before every workshop and was stored in every learner file. The agenda for the week would be sent to all learners 2-3 days in advance. The training design and materials would be maintained in a separate file in a separate location and in a safe cabinet in the facilitator's office.

#### **4.4 Presentation /facilitation**

Logistics were arranged and contingency plans prepared well in advance as required related to materials, room etc. Learners were advised and all pre-requisites and pre-work requirements were taken care of. Competencies that were used are as specified below:

##### **4.4.1 Preparing to facilitate**

This involved finalizing the place of the workshop, arranging for the internet access, printing of materials in advance, making room arrangements, space -tables, chairs, white board, podium, projector, computer, slide deck, markers, flip chart, etc., including server for accessing the internet and a printer for printing out materials for the workshop. Informing all learners through email of each week's agenda's and the pre- work they required to complete before coming to the workshop, such as reading up an assignment and making key points for discussions etc.

##### **4.4.2 Creating a learning environment**

Welcoming learners as they entered the physical learning environment, coming 15-20 minutes before time to ensure that the room was prepared for the learners and all required materials and

technology were made available; making arrangements for refreshments such as coffee and snacks to be served during the workshops etc. Welcoming learners with a bright smile and a big hug, asking them how their earlier week had gone had to be taken care of. Greeting each learner using their first names and when responding to questions or comments as this made them feel respected and also made them feel that they were given personal attention. This also kept them alert throughout the session.

#### **4.4.3 Engaging learners**

Using a variety of instructional techniques to provide content, which included interaction and sharing of real life experiences & story telling form of example sharing, group discussions, case study discussion, expectation discussions, activity feedback giving and receiving, sharing from each other's reflective diary's and reading them out aloud, giving adhoc presentations and role-play etc.

Maintaining an appropriate balance between providing content and allowing learners to participate - this was very important and a challenging thing to do. It was important for learners to talk and to share their learning. It was important to allow learners to communicate what they wanted to and to receive their feedback as the facilitator and to balance this with the agenda set for the session.

Using of appropriate language, anecdotes and examples to facilitate learning, and making use of paced training to meet the needs of the group. Interspersing the workshops and activities with questions also encouraged the learners to do the same in order to clarify understanding and remove ambiguity if any and to keep both learners and the facilitator on the same page.

Drawing upon learner experience, knowledge and skill to enhance learning as all learners were between the age group of 35 to 55 years, coming into this project with varied experiences, knowledge and skill and with tacit knowledge and transferable skills. This coupled with the new skills and learning's they gained, enhanced what they learned during the workshops and during the project. Each workshop encouraged active participation from all learners and proceeded through interactive discussion and feedback being given and received.

#### 4.4.4 Fostering learning

All information and concepts presented and explained to learners clearly and feedback was taken subsequently on whether they had understood, thus clarifying learners comprehension of key concepts presented.

#### 4.4.5 Assessing learning

Each learning objective was evaluated through various learners' activities and practice as required. Each workshop was for duration of 2 hours except 5<sup>th</sup> to 7<sup>th</sup> workshops that were of 3 hours duration. Each activity ranged between 20-30 minutes in duration.

**Table: 10 Workshops Conducted**

Se	Workshop	Modules Facilitated (No.)	Date	Type	Activities
1	1 <sup>st</sup> Workshop	(1) Adult Training, (2) Instructional Design & (3) Facilitation	26 <sup>th</sup> Oct, 2013	Group Activities	<ul style="list-style-type: none"> <li>▪ Welcome all participants to the project</li> <li>▪ Establish some ground rules to the project as a group</li> <li>▪ Listen to each one's story in the group</li> <li>▪ Facilitate Activity 1 – Learning Expectations</li> <li>▪ Facilitate Activity 2 – Reflective Diary</li> <li>▪ Facilitate each of these women to maintain a mandatory daily Reflective Diary</li> <li>▪ Facilitate Activity 3 – SWOT (Strengths, Weaknesses,</li> </ul>



				<p>Opportunities and Threats) Analysis</p> <ul style="list-style-type: none"> <li>- KSAO Analysis – Job Analysis Interview; Task Analysis, KSAO Identification</li> </ul>
2	2nd Workshop	<p>(1) Adult Training, (2) Instructional Design, (3) Presentati</p>	10th Nov, 2013	<ul style="list-style-type: none"> <li>- Key learning points from the previous session to be shared by each participant</li> <li>- Review assessments from previous workshop</li> <li>- Facilitate Activity 4 – Skills Audit-1 (Inventory)</li> <li>- Review of Need Assessment Competencies</li> <li>- Facilitate Activity 5 – Need Assessment-1</li> <li>- Facilitate Activity 6- Need Assessment-2</li> <li>- Document the learning outcomes needed by each based on the NA completed</li> <li>- Tabulate the results of KSAO Identification and Analyse the scores</li> <li>- Discuss the findings with each woman individually</li> </ul>

3	3rd Workshop	on, (4) Facilitation & (5) Need Analysis	30th Nov, 2014		<ul style="list-style-type: none"> <li>- Key learning points from the previous session to be shared by each participant</li> <li>- Review self-assessments from previous workshop</li> <li>- Discussion and Learner Interaction</li> <li>- Facilitate Activity 7- Skills Spotting</li> <li>- Facilitate Activity 8 – Skills Audit-2</li> <li>- Facilitate Activity 9- Discovering your Career DNA</li> <li>- Discuss KSAO’s (Knowledge, Skills, Abilities and Other Attributes) identified for each participant</li> </ul>
4	4th Workshop		18th Jan, 2014	Individual Activities	<ul style="list-style-type: none"> <li>- Key learning points from the previous session to be shared</li> <li>- Review and feedback of KSAO’s from previous workshop</li> <li>- Facilitate Activity 10- Priorities for Personal Development</li> <li>- Facilitate Activity 11 – Personal Development Plan (PDP)</li> <li>- Build consensus around support that is required based on the analysis done</li> </ul>

5	5 <sup>th</sup> & 6 <sup>th</sup> Workshops	(1) Instructional Design, (2) Facilitation & (3) Needs Analysis	15 <sup>th</sup> Feb, 2014	<ul style="list-style-type: none"> <li>▪ Key learning points from the previous session to be shared</li> <li>▪ Break down of key areas of support needed for each woman (based on the meeting held on 29<sup>th</sup> Jan with SfC Program Manager) – 2:35 to 3:05 pm (10 minutes maximum time for each participant)</li> <li>▪ Facilitate Activity 12 – PDP – Aims and Objectives</li> <li>▪ Facilitate Activity 13 – PDP – SMART Goals</li> <li>▪ Review SMART Goals</li> <li>▪ Facilitate Activity 14 – PDP – Setting Achievement Dates</li> <li>▪ Begin working on a professional portfolio</li> <li>▪ <i>Homework Assignment-</i> Read <i>Goal Setting Activity</i> Article and come back with Key learning for self from it.</li> </ul>
6	7 <sup>th</sup> Workshop	(1) Adult Training, (2) Instructional Design, (3) Presentation, (4) Facilitation & (5) Need Analysis	1 <sup>st</sup> Mar, 2014	<ul style="list-style-type: none"> <li>▪ Facilitate Activity 15 – PDP – Setting Timescales and Measures</li> <li>▪ Facilitate Activity 16 – PDP – Setting Success Criteria and Implementation Plan</li> <li>▪ Facilitate Activity 17 – PDP – Prepare an Action Plan and Milestones</li> <li>▪ Quantify goals to be achieved as far as possible, with timelines in the AP that is drawn; facilitate each one to prepare a Personal Development Plan (PDP) based on their need and SWOT analysis completed &amp; discuss Individual Action Plans</li> <li>▪ <i>Homework Assignment-</i> Read 2 articles on <i>Personal and Professional Development</i></li> </ul>

7	8th Workshop	(1) Adult Training, (2) Needs Analysis, (3) Facilitation & (4) Presentation	29th Mar, 2014	<ul style="list-style-type: none"> <li>▪ Key learning points from the previous session to be shared</li> <li>▪ Facilitate each one to prepare a list of their short-term, mid-term and long-term goals</li> <li>▪ Discussion of short-term goals identified by each participant</li> <li>▪ Break down key need areas of support needed for each woman</li> <li>▪ Design a mentoring plan once the Need and SWOT analysis is completed</li> </ul>
8	9th Workshop		12th Apr, 2014	<ul style="list-style-type: none"> <li>▪ Key learning points from the previous session to be shared</li> <li>▪ Prioritise key pre-requisites</li> <li>▪ Design a coaching plan once the Need and SWOT analysis is completed</li> </ul>

				<ul style="list-style-type: none"> <li>- Plan on Job search strategies</li> <li>- Discussion and Learner Interaction</li> <li>- Feedback</li> </ul>
9	10 <sup>th</sup> Workshop		26 <sup>th</sup> Apr, 2014	<ul style="list-style-type: none"> <li>- Arrive at a consensus on their ST, MT and LT needs</li> <li>- Facilitate the learner to individually present her plan for mutual achievement of her short-term goals</li> <li>- Facilitate the learner to individually present her plan for mutual achievement of her mid-term goal to be initiated at the end of the project</li> <li>- Go back to Activity 1 – <i>Learning Expectations</i> – and complete Part B</li> <li>- Discussion and Feedback</li> </ul>

How did learners get meaningful coaching and feedback? By getting feedback immediately and coaching being specific, need based, and one-on-one. Gaps were ascertained because activities and problems were identified based on needs felt by the learners because their short-term and mid-term goals were identified which were meaningful for the learners.

Each learner received meaningful feedback based on personal and one-on-one interaction and soon after, a review of their answers was completed by their facilitator who was also able to support transfer of learning through feedback given to all the 3 learners. A positive change in behavior in all the 3 learners was recognized after the first 3 workshops. A great improvement in self-confidence in learner 1 was noticed and a greater amount of goal-focus in learner 2 was noticed and learner 3 was able to express written thoughts more succinctly.

The following learning objectives were validated through the above activities:

1. Expressing and communicating thoughts clearly in English;
2. Creating a personal development and a goal focused action plan;
3. Producing a professional portfolio to demonstrate organizational skills;
4. Creating a plan for prioritization based on importance and urgency of tasks;
5. Evaluating approaches to goal setting and reflecting on how to make improvements;
6. Interpreting the relationship between personal effectiveness and self-confidence;
7. Being clear goal focused and successful at achieving goals;
8. Developing and executing successfully and confidently the knowledge they have.

#### **4.5 Evaluation**

This involved explaining with evidence, how the whole program / presentation / facilitation was validated before the event and identifying changes made as a result of validation. Questions that were asked before the event were as follows:

- Why – will the learners be interesting in doing this workshop?
- What – should be the goals for this workshop?
- Who – are the potential learners?
- How – should the learning objectives be achieved?
- Where – should these workshops be held?
- Evaluation – how will learners be assessed as having achieved their required goals?

These questions helped validate the following, after the event:

##### **4.5.1 Evaluating learner reaction**

This involved the assessment of the aggregate learner reaction based on feedback that was received from learners during various activities that they did, both verbally and written.

##### **4.5.2 Evaluating learning objectives**

This was done by writing learning objectives, developing materials, evaluating those objectives, assessing individual achievement of those learning objectives, assessing aggregate achievement of those objectives and recommending changes based on evaluation of those objectives.

*Key Outputs:* The learning objectives were well created at both skill and knowledge level given the time constraints of the project. Facilitation skills would need to be improved by becoming a better listener.

#### **4.5.3 Evaluating transfer of learning**

Evaluating transfer of learning helped in identifying desired performance outcomes, evaluating learning objectives, assessing transfer of learning and recommending changes based on those.

*Key Outputs:* The sources of data were the various activities that have been designed and planned from activities 1 to 17 and more conducted through workshops 1 to 10. The achievement of the learning objectives during training was evaluated making use of tools such as role plays, case study, tests etc. Assessment of performance results was done through evaluation of training. Learning was assessed through learning objectives set out at the beginning – both application and comprehension–levels, achieved through various activities designed and conducted during the workshops.

#### **4.5.4 Evaluating results**

This was done by identifying measures, assessing results and recommending changes based on those.

*Key Outputs:* Planning on the evaluation of results was done by using the following methods both quantitative and qualitative such as: observation, interviews, questionnaires, group discussions, skill observations, teach backs, action planning, performance reviews, quarterly reviews, peer evaluations and self-assessments. Assessment results were obtained through the evaluation of the training completed as a result of the achievement of the learning objectives.

- For the learning objective: ‘*expressing and communicating thoughts fluently in English*’, results were evaluated through oral and written group and individual activities during

workshops 1 to10.

- For learning objective: *'learning to become clear goal focused'*, results were evaluated by creating a personal development plan at the end of a series of activities from 10 to 17 during workshops 1 to5.
- For learning objective: *'developing organization skills'*, results were evaluated by demonstrating how to develop a professional portfolio in workshops 5 and6.
- For learning objective: *'prioritization of tasks'* results were evaluated through activities 3, 4, 7, 8, 10 and 11 conducted from workshops 1 to4.
- For learning objectives: *'approaches to goal setting'*, *'personal effectiveness and self-confidence'* and *'being clear goal focused'*, results were evaluated through key points discussed on resources that were identified that learners took home as assignments.
- For learning objective: *'execute knowledge successfully'*, results were evaluated through activities 1 to 17 conducted from workshops 1 to7.

## **5 The results and outcomes of implementing thestrategy**

### **5.1 Effectiveness of initial goalassessment**

Asking learners to complete a needs assessments activity as the initial step, helped in preparing for them a set of customized goals with timelines. Based on a NEED and SWOT analysis, it helped learners prepare an action plan. All 3 learners achieved short-term goals during the project while mid-term goals were initiated before the end of the project. Each learner also individually created long-term goals to be achieved after the project based on practice gained during the project. Ability to give timely support to each learner and connecting them to resources and right networks based on their action plans, supported development for all 3learners.



## **5.2 Effectiveness of needanalysis**

### **5.2.1 Successes**

The analysis led to a rich source of information on each of the learner's areas of strengths and weaknesses, opportunity's and threat's and to a rich source of knowledge, skills, abilities and attributes that helped in evaluating their goals and what their learning objectives should be.

## **5.3 Effectiveness of the designprocess**

### **5.3.1 Successes**

Arriving at the learning objectives – both at the application level and the comprehension levels to meet the skill and knowledge gaps of the learners ascertained from the needs, SWOT and KSAO analysis; and then being able to integrate those seamlessly through the 17 activities designed to achieve those learning objectives, was a key success of the design process

## **5.4 Effectiveness of presentation /facilitation**

### **5.4.1 Successes**

An awareness of the ability to present / facilitate during the project and learning what facilitation actually meant and involved; the true meaning and impact of facilitation on learners and learning and, the extent to which it was carried out successfully during the project process; this in itself was tremendous success.

## **5.5 Effectiveness of the evaluationprocess**

### **5.5.1 Successes**

There were many successes such as evaluation of learner reaction and feedback – both verbal and written and evaluation of learning objectives. The formulation of learning objectives was in itself a major point of success and the activities to achieve those, which helped immensely in the evaluation piece.

**6 Reflections on lesson learnt on the topic (the last page ideally shall include a list of bulleted lessons learnt). This could also include recommendations (positive or negative) to other learning institutions wishing to implement a similar practice.**

## **6.1 Reflections on lesson learnt:**

In the overall analysis, the project training provided an immense opportunity for learning

at different levels that could have never thought to be possible. Although there were several challenges and frustrations that were faced, and several gaps in knowledge and skills that had to be filled up by going through books and learning material that had to be referred to at different stages of this process; yet what was key is the project helped apply the several tools and practical principles of adult learning in an environment very different from a classroom. The project and its' workshop activities' objectives have provided opportunity to link deeper skills and knowledge of adult training gained with personal career goals and aspirations in a very special and unique way meeting individual needs within the same context.

At the end of which, it can be very confidently claimed that success on this journey has been accomplished with more experience being gained than before with the project enabling one become a better facilitator, a better presenter, a better adult trainer, a better instructional designer and a better needs assessor. Humbled also by this knowledge that this journey has only begun, as there is still so much more to accomplish and so much more to learn.

### **6.1.1 Personal reflection**

As a professional adult educator and professor in an educational and academic environment, getting to understand principles of adult training from the perspective of adult education is key. The project tested my personal knowledge and ability to apply those principles learnt outside the context of a classroom, giving me confidence that was very much needed. This required a lot of hard work, dedication and commitment and made me put in long hours. I was able to learn and grow as an educator and a facilitator through this project and more than this, I was able to create, plan and implement a project plan; designing and executing it successfully and beyond the traditional confines of a classroom using adult learning principles.

It also required me to be responsible for learners' outcomes and goals, to align them to their personal employment goals, which was not an easy responsibility. Finally, it was a coming together of a lot of good intentions and a lot of hard work that made all these goals achievable at

various levels. It is beyond belief that I was able to make this a roaring success for all stakeholders involved myself included.

## **6.2 Feedback and self-reflection**

The project helped align 3 capable women to their professional fields of employment and expertise. Learner 3 got was the 1<sup>st</sup> one get success and found her job in her area of expertise and mastery: Communication as a ‘Communications Coordinator’ in TRIEC (<http://triec.ca>) within 3 months of the start of the project, after the 3<sup>rd</sup> workshop. The 2<sup>nd</sup> learner was the next to see success and got a permanent job with the Ontario Government within the Treasury Board Secretariat (<https://www.canada.ca/en/treasury-board-secretariat.html>) after the 8<sup>th</sup> workshop. The 1<sup>st</sup> learner worked as a Consultant and started founded her own company (ggSimplicityITSolutions) upon the completion of 10 workshops.

The goals of the project and the action plan for the learners were achieved as a result of the meticulous planning that went into this project even before it started. This was possible due to the planning done at the pre-implementation stage and due to timelines that were maintained and adhered to. Although, some of the workshops had to be altered in between due to constraints beyond my control, yet it was all-possible because of the internal flexibility that was built into the plan. The methodology of the workshops allowed for that flexibility and at the end it was a team effort, without which, this project could not have become such a success.

## **6.3 Effectiveness of the need analysis**

### **6.3.1 Challenges**

Some of the key challenges faced were while doing the need analysis were especially encountered while determining causes of performance gaps at the job level and organizational level, since the scenario and application were not relevant at the organization or job level. So this was a challenge. Key outputs here had to be based on past sources and relied on learners’ earlier jobs held as each learner / women in their current state were all unemployed.

### **6.3.2 Lessonslearnt**

This project would be approached differently a 2<sup>nd</sup> time and more emphasis would be laid on needs analysis right from beginning until the end instead of having it as only as one part of the project.

## **6.4 Effectiveness of the design process**

### **6.4.1 Challenges**

The challenge involved in the design did not begin and end merely with choosing / designing the activities, or planning / arriving at the learning objectives, but began with designing the project itself, laying out the plan, the before, during and after the implementation plan. The first challenge lay in planning out and designing the details meticulously and implementing them according to the plan. The second challenge lay in aligning the needs of the learners based on the gap / needs assessment done to the learning objectives – both at the application and competency levels and aligning activities to meet those learning objectives appropriately.

### **6.4.2 Lessonslearnt**

To put in place a design process that would be more systematic and not work on the design competency as a part of other competencies but work on it as a stand-alone competency only, to be able to derive the maximum learning and benefit from it.

## **6.5 Effectiveness of the presentation /facilitation**

### **6.5.1 Challenges**

It required a conscious effort and was a challenge many times not to ‘talk to’ and ‘lecture to’ but ‘to listen’ and to ‘facilitate’. Not to ‘impose’ what ‘I thought’ the learners must do, but how best ‘I could help them’ channelize what ‘I think they wanted to do’. Facilitation was walking that thin line between the urge to give the learners all the collective ‘wisdom’ from personal years of experience and holding it all back, and giving them just so much as they needed to know at any given time. Presentation was fairly simple as compared to facilitation. Maintaining an appropriate balance between providing content and allowing learners to participate was indeed the biggest challenge of all. The time constraint of the workshop also added to the challenge.

## **6.5.2 Lessons learnt**

Facilitation is an art that can be cultivated and must be cultivated to bring out the potential of the learners. One makes presentations as a teacher most of the time in life but never facilitation is more rare. It is a new skill that needs further honing and one that needs continued practice for perfection.

## **6.6 Effectiveness of the evaluation process**

### **6.6.1 Challenges**

The challenge lay in evaluation being not merely a quantitative one but also being a qualitative and a subjective assessment. Added to this was the customized nature of the need analysis and the activities. Each learner had to be evaluated based on her current level of achievement of the learning objectives that could not be evaluated at all times on a quantitative criteria or measure effectively

### **Lessons learnt**

It is not possible to achieve 100% measure of satisfaction and pinpoint gains when there is a qualitative measure of evaluation, as these tend to be largely subjective.

## **6.7 Recommendations to learning institutions wishing to implement a similar practice**

The following individual components were considered and these questions may serve as a guide throughout such a process for others, who wish to follow.

### **6.7.1 The context**

This must describe the training opportunity. It must outline the context in which the problem / opportunity is occurring. It must identify factors that will help in the learners' involvement and factors that may hinder their involvement and must also identify the facilitator's personal learning objectives.

### **6.7.2 Needanalysis**

This must involve conducting a topic analysis. It must identify methods of analysis selected and describe the rationale for selection. The facilitator must also ensure that the analysis is comprehensive and that subtasks follows standard verb and noun formats and are clearly presented to the learners.

### **6.7.3 Design**

This must provide an overview of the session design and must identify the learner profile clearly. It must identify the pre-requisite skills and knowledge, select priority tasks for training and include both application and comprehension level learning objectives. There must be a rationale for the design approach that provides linkages to adult learning principles.

### **6.7.4 Presentation /facilitation**

Delivery channels must be selected for learners for which clear rationales must be provided. Outlines for a lesson plan must be created showing specific activities and timing for each session showing how learning activities would pan out matching learning objectives. These must include appropriate variety of learning activities that provide optimum opportunities for practice for learners. Learner materials that are appropriate for learners, instructor materials that are appropriate for the design and for facilitators, including job aids may be provide with a high-level overview describing how the session will playout.

### **6.7.5 Evaluation**

The overall evaluation process must cover the methods – both quantitative and qualitative, sources of data, analysis strategies that the facilitator would be using to evaluate learners. This must indicate how the facilitator will gather data to support reflective practice, feedback strategies, assessment etc.

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