

PETROLEUM DEVELOPMENT OMAN

Core HSE competence assessments

Guidance to all those involved in assessment

Ian Bowen

July 27th 2010

A guidance document for all those involved in the process of assessing HSE competence associated with courses in PDO's HSE Training Specification document SP 1157, whether at Approved Training Institutes or the workplace.

Contents

Conducting core HSE Competence Assessments in the PDO community	4
Introduction	4
1 Requirements for occupational competence of assessors and verifiers	5
1.1 Assessors	5
1.1.1 Workplace supervisory staff	5
1.1.2 PDO Approved Trainers.....	5
1.1.3 Assessor CPD pre-requisites.....	5
1.1.4 Assessor preparation	6
1.2 Internal Verifiers (IVs).....	6
1.3 External Verifiers (EVs).....	6
2 Carrying out HSE competence assessments	7
2.1 The Basic Approach:.....	7
2.1.1 During and post-training HSE competence assessments.....	7
2.1.2 Recertification HSE competence assessments.....	7
2.1.3 Verification of equivalent prior training competence assessments	8
2.1.4 Workplace assessment of core HSE competence	8
2.2 Minimum Evidence Standard:.....	10
3 What is required of an Assessor?	10
3.1 Assess core HSE performance in the workplace against agreed standards	10
3.1.1 Performance criteria	10
3.1.2 Giving support and feedback in the workplace	11
3.1.3 Knowledge requirements.....	11
4 Internal Verification	13
4.1 Purpose of IV.....	13
4.2 What must Internal Verifiers consider?.....	13
4.3 Quality Assurance of Assessments.....	13
4.4 Internal Verification Records	14
5 External Verification of Assessments.....	15
5.1 What is required of an External Verifier (EV) ?.....	15
5.2 Quality Assurance of the HSE competence assessment systems and procedures.....	15
5.3 External Verification Records.....	15

Annexe I	17
Guidance to Workplace Supervisory Staff	17
PART 1	17
Identifying the most appropriate assessment method	17
1 Location of performance criteria	17
2 Key parts of Performance Criteria:	17
3 Type of performance required.....	17
4 Standard of performance required.....	17
5 Range statements	18
6 Knowledge & Understanding required	18
7 Written assessments.....	18
8 Invigilation.....	18
9 Tests for Evidence acceptability.....	18
10 Assessment Records.....	19
PART 2	20
: Promoting sustained safe HSE skills and behaviours in the workplace	20
1 Assisting staff to learn in the workplace.....	20
1.1 The activities you are likely to be involved in:.....	20
1.2 Demonstrate skills and methods to learners.....	20
Performance criteria	20
1.3 Instruct learners	22
Performance criteria	22
1.4 Knowledge requirements.....	22
General knowledge and understanding.....	22
Principles and concepts	22
External factors influencing human resource development	22
2 Coaching individual learners in the workplace	24
2.1 Performance criteria	24

Conducting core HSE Competence Assessments in the PDO community

Introduction

This guidance is being issued to assist:

- PDO Approved Trainers,
- workplace supervisory staff, and
- those required to internally or externally verify HSE competence assessments of PDO and contracting staff after training and/or in the workplace.

The guidance is based on that offered by the Employment National Training Organisation (ENTO) in the United Kingdom as it relates to National Occupational Standards (NOS, formerly NVQ) and the Qualifications and Credit Framework (QCF). The general principles for assessment of HSE competence specified by PDO are broadly in line with those used in the UK's National Vocational Qualifications (NVQ) system.

The process and arrangements set out in this guidance for assuring core HSE competence of PDO and contractor staff are separate to the established PDO internal system used to assess competence of individuals holding HSE critical positions against job competence profiles (JCPs).

The terms, Awareness, Knowledge and Skill are used in this guidance note to generically describe the nature of what is learnt, not the level of competence acquired or demonstrated .

In PDO's internal system for assuring competence of HSE critical positions, the levels of Awareness, Knowledge, Skill and Mastery are used to describe the level of HSE competence acquired and demonstrated by the individual.

The principles of assessment and what constitutes acceptable evidence explained in this guidance note may be found useful by line managers when carrying out the review of claimed HSE competence of their reports holding HSE critical positions.

Some of the evidence produced by core HSE competence and recertification assessments, may be used by PDO staff holding HSE critical positions when addressing the HSE competence evidence requirements in their JCP.

This space deliberately left blank

1 Requirements for occupational competence of assessors and verifiers

1.1 Assessors

Persons carrying out assessments must have sufficient occupational competence to ensure current knowledge and experience of the competence areas being assessed. They should have a clear understanding of the HSE competencies specified in SP 1157, and of the principles and best practice associated with vocational assessment of competence.

1.1.1 Workplace supervisory staff who are to carry out workplace core HSE competence assessments must:

- have held a post for a minimum of 1 year, within the last 2 years, which involved performing the activities in the standards, as an experienced practitioner.

Additionally, it is **recommended** that they have, as a minimum:

- attended the PDO course on Coaching, Mentoring and Competence Assessment and achieved competence, **OR**
- obtained a recognised assessor qualification equivalent or better than Unit L20 UK National Occupational Standards, 'Support competence in the workplace'.

1.1.2 PDO Approved Trainers who are to conduct HSE competence assessments on candidates either:

- during and/or after training on HSE courses,
- for recertification, or
- to verify claimed equivalency of prior training,

must be:

- an experienced trainer of at least 1 year's standing in delivering the course whose competence requirements are being assessed **AND**
- have 1 year's practitioner experience in the competence areas being measured, **AND**
- **must** hold a formal assessor qualification, as set out in SP 1157 version 7.

1.1.3 Assessor CPD pre-requisites

All assessors must be able to demonstrate they have, in the last 12 months carried out at least 2 of the following activities:

- Technical skill update training
- Course attendance in relation to competence assessment
- Studying for vocational learning and development
- Study relating to job role as a trainer and/or assessor
- Examining related to occupational roles.
- Qualifications development work
- Other relevant CPD activity

1.1.4 Assessor preparation

All assessors must have a sound working knowledge of the content of the standards they are assessing and the assessment requirements. It is **strongly recommended** that companies should properly prepare their work place assessors to carry out quality HSE competence assessments.

Further guidance that may assist workplace supervisory staff in respect of coaching and mentoring staff members are included in Annexe I to this document. The guidance is issued to help supervisory staff carry out their role of ensuring all staff develop and consistently sustain the required HSE skills and behaviours in the workplace.

1.2 Internal Verifiers (IVs)

Internal Verification is the term used for quality assurance of assessments conducted by assessors. Internal Verification needs to be conducted within PDO departments or directorates, its contracting companies, Approved Training Providers (ATPs), and Contracting companies approved to deliver PDO training in-house (AIHTCs). Persons who carry out this role are known as Internal Verifiers (IVs) and **must**:

- have attended the PDO course on Coaching, Mentoring and Competence Assessment and achieved competence and within 12 months of doing so, obtained a recognised assessor qualification equivalent to or better than UK National Occupational Standards Unit L20, 'Support competence in the workplace' , **AND**
- have sufficient personal experience of having conducted assessments of the standards they are verifying, or in an appropriate and related occupational area, **AND**
- have direct responsibility and quality control of assessments of the standards, **AND**
- have a sound working knowledge of assessment and verification principles for internal quality assurance and the particular internal verification requirements.

It is **strongly recommended** that Internal Verifiers:

- hold an Internationally recognised verifier qualification equivalent to or better than the UK's NVQ Unit V1 'Award in conducting internal quality assurance of the Assessment Process', **AND**
- are higher in the line management chain than the assessors they have been allocated to verify.

1.3 External Verifiers (EVs)

External verification is the term used for conducting verification and validation of the core HSE assessments and internal verifications processes in contracting companies, PDO Directorates or departments by an independent party. The persons carrying out this role are known as External Verifiers. External verifiers will be drawn from experienced senior practitioners in the broad occupational area of the standards they will verify. They will either be from PDO or from 3rd party

organisations contracted to PDO, and will be appointed by PDO's HSE Training and Competence HLD8 team on behalf of PDO's Head of Learning & Development.

As a minimum, External Verifiers ***must***:

- hold an Internationally recognised assessor qualification, **AND**
- have held posts of responsibility involving the monitoring and review of the occupational competence of others, or have been responsible for the internal verification and assessment of occupational standards, **AND**
- have a sound working knowledge and experience of vocational assessment, **AND**
- be familiar with internal verification procedures for external quality assurance, **AND**
- be able to demonstrate competence in the external verification procedures set out by PDO.

It is **recommended** that External Verifiers hold an Internationally recognised verifier qualification equivalent to or better than the UK's NVQ Unit V2 'Award in conducting external quality assurance of the Assessment Process'.

2 Carrying out HSE competence assessments

2.1 The Basic Approach:

2.1.1 During and post-training HSE competence assessments

These assessments are sometimes referred to as formative and summative assessments.

Formative assessments are those carried out during training as it progresses. The assessor is able to confirm that the individual has met one or more specific performance requirements in the standard through relevant activities within the training program. *For example, if an individual is able to demonstrate he can don and start an H2S Escape set correctly within 7 seconds during training, this particular performance requirement may have been met.* The evidence used by the assessor to reach the judgment needs to be recorded.

Summative assessments are those where the overall assessment judgment against the standard has been made through the combined outcomes of any formative assessments and a final assessment to measure the individual's performance in any outstanding areas. *For example, in a simulated H2S leak, when the alarm is raised, does the individual sight the windsock, and move in the correct direction in relation to prevailing conditions to escape from the hazard?* Add the outcome of this, and any other performance criteria to be measured during summative assessment, to the individual's formative assessment outcome(s) to arrive at the final competence judgment. Evidence used by the assessor to reach the judgment needs to be recorded.

2.1.2 Recertification HSE competence assessments

These assessments are carried out at the intervals specified in SP 1157 for each HSE course type, and do not include any preparatory training. The standard will include the core performance criteria used

during the post-training HSE competence assessment. Additional performance criteria will be included in recertification assessments to reflect the expected development of the individual's competencies gained through application of knowledge and understanding acquired from training, in the workplace. The assessor must measure the individual's performance against all of the performance criteria set out in the standard.

If the individual does not achieve competence, the assessor must have identified the knowledge, understanding and skill gaps of the individual. The individual must be informed of the gaps immediately after the assessment has been completed, by the assessor.

The identified gaps must be recorded by the assessor and forwarded to the nominator by the most effective means, so that the client has the opportunity to address the identified gaps before re-assessment.

Failing to achieve competence after re-assessment requires the individual to re-attend the appropriate PDO course.

2.1.3 Verification of equivalent prior training competence assessments

The purpose of the assessment is to verify that the claimed equivalency is justified by assessing the individual's performance against every part of the post-training HSE competence standard for the appropriate PDO course. No pre-training is included. Individuals who meet the eligibility criteria for these assessments will be assessed in exactly the same way as an individual who had attended the appropriate PDO course.

If the individual does not achieve competence, the assessor must have identified the knowledge, understanding and skill gaps of the individual. The individual must be informed of the gaps immediately after the assessment has been completed, by the assessor.

The identified gaps must be recorded by the assessor and forwarded to the nominator by the most effective means, so that the client has the opportunity to address the identified gaps before re-assessment.

- Re-assessment must be carried out by the same assessor.
- Failing to achieve competence after re-assessment requires the individual to attend the appropriate PDO course, but at a different training Institute.
- In the case of PDO staff, the training must be conducted by the contracted Institute, but the trainer must not be the individual who carried out the assessments.

2.1.4 Workplace assessment of core HSE competence

To make sure that they cover all of the competence areas required in the PDO core HSE standard, assessors will need to consider:

- Agreeing work patterns which provide staff members opportunities to develop and show their competence.
- Identifying opportunities for assessment in the work place.
- Observing staff members perform tasks in the workplace.
- Asking questions to ensure staff members understand what they are doing and why.
- Providing staff with guidance (coaching) and feedback on their performance.
- Identifying any training or development individual staff members need.

2.2 *Minimum Evidence Standard:*

To ensure the assessments are carried out conform to the minimum evidence standards, the assessor must consider:

- Observations
- Oral questioning
- Examination of evidence collected/produced by the individual

3 What is required of an Assessor?

PDO's expectations of assessors and their assessments, are based upon the requirements set out in the UK NVQ Unit L20 'Support Competence Achieved in the Workplace'.

3.1 *Assess core HSE performance in the workplace against agreed standards*

3.1.1 Performance criteria

The Assessor must be able to do the following:

- Identify which tasks you will need to see performed in the workplace.
- Arrange how and when you will watch the staff member perform their work activities to compare their performance with the PDO standards.
- Give staff members advice on how to collect appropriate evidence from the workplace.
- Identify who may be involved in or be affected by your assessments and agree arrangements with them.
- Observe the staff member's performance safely and identify where they have met the PDO standards.
- Ask questions to check staff members' knowledge and understanding of core HSE workplace activities.
- Ensure that the evidence you consider meets the required PDO standards and comes from staff members' own work.
- Decide if you are prepared to confirm that the staff member's performance meets relevant parts of the PDO standards.
- Identify gaps in evidence of competence, and how these may be addressed in the work place.
- Keep the records of your assessments safe and pass them on by following agreed internal procedures.

3.1.2 Giving support and feedback in the workplace

Performance criteria

The Assessor must be able to do the following:

- Make sure that the staff member understands your assessment decision.
- Choose an appropriate time and place to give feedback to the staff member.
- Give staff members clear and useful feedback on their performance as soon as possible after your assessment.
- Be constructive and encouraging when giving feedback.
- Tell staff members how they can improve their performance if necessary.
- Identify and agree any further training or development staff members need before completing your assessment process.
- If you and the staff member cannot agree on your assessment of their competence, refer the matter to the appropriate person.
- Record the follow-up action and the next steps you and the staff member have agreed on.

3.1.3 Knowledge requirements

An assessor needs the following knowledge and understanding to carry out core HSE Competence Assessment. This will be evidenced by the outcome of the assessor's work activities and through evaluations of the systems and processes the assessor uses by IVs and EVs.

3.1.3.1 General Knowledge & Understanding:

- The nature and role of assessments in the workplace
- how to provide opportunities for carrying out assessments in the workplace
- how to review assessment plans and identify where work activities can be assessed
- how to identify tasks you can see in the workplace and which aspects of competence they show
- how to agree arrangements for observing a staff member perform tasks in the workplace
- how to observe staff members without disrupting or affecting their work activities
- who else in the workplace you should involve when assessing staff members' competence
- how to record your assessments and pass information on to other people
- how to use your assessments to motivate staff members

3.1.3.2 Principles and concepts:

- how to identify what the staff member needs to meet PDO levels of core HSE competence
- how to make accurate and fair comparison between a staff member's performance and PDO core HSE standards
- how to use normal work activities to assess staff members' competence
- how to provide assessment opportunities which are fair, consistent and do not discriminate against any member of staff

- how to ask questions which check staff members' understanding of what they are doing without leading them
- how to give constructive feedback to staff members
- how to encourage staff members to ask questions and seek advice

3.1.3.3 Factors influencing workplace assessment

- how to ensure that legal requirements to protect the environment and health and safety are met during the assessment process
- how to take account of the assessment requirements of PDO when assessing competence in the workplace
- who to pass information on to, and when
- who to involve when you have a problem making an assessment judgment, and the procedures you should follow

4 Internal Verification

4.1 Purpose of IV.

The principal purpose of internal verification is to quality assure the HSE competence assessment process used by assessors in the contracting company, PDO directorate or department. This is achieved through ensuring that all of the applicable criteria for carrying out HSE competence assessments have been properly followed by assessors, and the assessment outcome is therefore valid.

4.2 What must Internal Verifiers consider?

The principles of conducting internal verification are the same irrespective of which HSE competencies are being assessed by the assessors. However, the range of HSE competencies assessors conduct and that IVs must consider will vary, depending on the nature of the organisation involved, as follows:

Organisation	Competencies to IV
Approved Training Providers	All HSE competencies for courses, re-certifications and equivalent prior training they have been approved to deliver or assess.
Contracting companies approved to deliver PDO HSE programs in-house	All HSE competencies for courses they have been approved to deliver in-house
Contracting companies	Core HSE competencies for own staff
PDO Directorates / Departments	Core HSE competencies for own staff

4.3 Quality Assurance of Assessments

Irrespective of the type of organisation involved, on at least two occasions per year, the IV should hold liaison meetings with all the assessors forming part of the IV's assessor team, to ensure consistency and compliance.

At least twice in each calendar year, the IV should carry out activity to quality assure:

- The company's procedures for arranging and conducting HSE competence assessments were followed by the assessor(s).
- The assessors met the qualification and experience requirements when the assessments were conducted.
- The assessment records kept by the assessor(s) adequately document the evidence upon which each HSE competence assessment judgment was made.
- The evidence used by the assessor(s) to reach their competence assessment judgments were evidently the candidate's own work and were:
 - Current
 - Appropriate
 - Relevant and

- Sufficient

4.4 Internal Verification Records

Within 14 days of conducting an IV activity, IVs should report their findings to the assessor(s). The report should always indicate:

- The date and scope of the IV activity.
- A summary statement concerning overall compliance by assessors with PDO's requirements concerning HSE competence assessment.
- A statement of the compliance of IVs and assessors with PDO's requirements
- A list of the assessment records inspected and the names of those assessed.
- A list of the Assessors and candidates interviewed as part of the IV activity.
- Validation or otherwise of each of the HSE competence assessments carried out by assessors since the previous IV activity.
- Recommendations for assessor improvement, where these are thought to be necessary.

Records relating to the IV's role in the company and of HSE assessments must be held securely by the IV for scrutiny when required by an EV.

This space deliberately left blank

5 External Verification of Assessments

5.1 What is required of an External Verifier (EV) ?

The principal purpose of external verification is to provide independent quality assurance of the assessment process and systems being used to measure compliance with PDO's HSE competence assessment standards within the contracting company, PDO directorate or department. This is achieved by:

- ensuring that the company's assessment procedures and systems are effective at achieving compliance PDO's standards,
- ensuring that IV(s) meet PDO's stated qualifications and experience requirements for an IV, and
- ensuring that IV(s) are correctly verifying and validating the assessments and assessment practice that have been carried out by assessors.

5.2 Quality Assurance of the HSE competence assessment systems and procedures.

The EV will carry out a verification visit to his allocated contracting companies, PDO directorates or departments, on at least one occasion per year. This should be by prior appointment with the company or department being visited. The EV should include the following activities during a verification visit:

- Inspection of the company's documented arrangements for arranging, conducting and verifying HSE competence assessments
- Inspection of the company's records relating to IVs and assessors, their qualifications, experience and CPD.
- Inspection of the company's training and assessment records relating to staff members that were subject to the requirements of HSE competence assessment since the previous EV visit.
- Inspection of IV records of internal verifications to ensure all assessments carried out since the previous visit have been correctly verified.
- Interviews with at least 25% of the company's IVs and 10% of the company's assessors, to verify sector competence and currency in respect of competence assessment.
- Interviews with at least 25% of candidates who have been assessed since the previous EV visit to obtain the candidates' observations of the competence assessment process as it was applied to them.

5.3 External Verification Records

Within 1 calendar month of conducting an EV visit, EVs should report their findings to the contracting company and its contract holder (if different to the EV) or HSE Training Focal Point of the PDO department concerned. A copy of the report should also be held by the EV. The report should always indicate:

- The date and scope of the EV visit.
- A summary statement concerning overall compliance with PDO's requirements concerning HSE competence assessment.
- A statement concerning the adequacy of the arrangements used to achieve compliance with HSE competence assessment requirements
- A statement of the compliance of IVs and assessors with PDO's requirements
- A list of the assessment records inspected and the names of those assessed.
- A list of the IVs, Assessors and candidates interviewed as part of the EV visit.
- Validation or otherwise of each of the HSE competence assessments carried out since the previous EV visit.
- Recommendations for improvement, where these are thought to be necessary.

This space deliberately left blank

Annexe I

Guidance to Workplace Supervisory Staff

PART 1

Identifying the most appropriate assessment method

1 Location of performance criteria

All the HSE performance criteria are published by PDO in the current version of SP 1157.

2 Key parts of Performance Criteria:

- Exactly what must be performed
- To what standard it must be performed
- Within what range of circumstances it must be performed
- The underpinning knowledge and understanding required.

3 Type of performance required

This is indicated by a 'doing' word.

e.g. Demonstrate, Operate, Carry out, or State, Explain, In your own words etc.

This indicates to the assessor how to measure the performance in the most suitable way. Words used to indicate that physical action is required, cannot be measured orally or in writing, for example.

- Demonstrate, Operate, Carry out, etc – are best assessed through observation.
- State, Explain, In your own words etc - are best assessed orally.
- Write, list, etc – can only be assessed in writing.

4 Standard of performance required

The standard to which the performance needs to be carried out will be stated clearly.

E.g. within 7 seconds, 100% correctly, etc.

When the performance is carried out by a candidate, they must achieve this requirement to be judged competent.

5 Range statements

The range statement will tell you under what circumstances the performance must be carried out.

E.g. in the workplace, during simulation, from photographs or illustrations, etc.

This tells the assessor exactly under what kind of circumstances the performance can be carried out to be considered valid.

6 Knowledge & Understanding required

The underpinning knowledge and understanding required of a candidate is often unstated, but is always that included in the appropriate PDO HSE course. The assessor must know this and be prepared to test the candidate's underpinning knowledge as it relates to the performance being assessed.

If the assessor suspects that understanding is lacking due to what has been observed or demonstrated, the apparent gaps can frequently be confirmed or the suspicion removed through oral questioning. Knowledge gaps may be dealt with orally as well, but may also be tested for through written assessment.

7 Written assessments

Written assessment when used, should minimise the possibility of the candidate being able to guess the correct answer(s).

Having candidates fill in missing phrases in incomplete statements is probably more suitable than a series of multiple choice 'tick-box' questions.

The assessment papers should always be selected objectively from a question bank, with ideally, no two assessment papers in the same group of delegates being the same – but all assessing the same topic areas.

8 Invigilation

Written assessments require invigilation too – a person who is independent of the training, coaching or assessment, who ensures fair play and no cheating between candidates.

9 Tests for Evidence acceptability

There are four essential tests for evidence used in assessment, and no matter what kind of evidence it is, it must meet the four tests:

- a. Is it current?
- b. Is it Authentic, i.e. the candidate's OWN work?
- c. Is it relevant – to the area of competence being measured?
- d. Is it sufficient – does the totality of evidence meet the performance standard?

10 Assessment Records

A final reminder – assessors must keep records of:

- what it is they have measured,
- how,
- when,
- where, and
- with who.

If you are not able to show an Internal Verifier that your judgment was based on valid evidence, the candidate's assessment may be ruled as void, and he'll have to do it all again.

PART 2: Promoting sustained safe HSE skills and behaviours in the workplace

1 Assisting staff to learn in the workplace.

As part of their normal role, Supervisory staff have the responsibility to make sure the members of their team are able to carry out their work activities as safely and effectively as possible. Less experienced members of the workforce will often need help to develop knowledge, understanding and skills related to parts of the work from those who are more experienced.

This guidance is appropriate for you if your role involves:

- demonstrating skills and methods to learners in the workplace
- instructing learners in procedures and processes in the workplace

1.1 The activities you are likely to be involved in:

- demonstrating how equipment is used
- showing a learner how to do something
- giving learners instructions on what to do or how to carry out a particular activity
- deciding when you should use demonstration or instruction to encourage learning
- reviewing the potential use of technology-based learning, when it's available
- checking on the progress of learners
- giving feedback to learners

1.2 Demonstrate skills and methods to learners

Performance criteria

You must be able to do the following:

- Base the demonstration on the skills needed and the order they must be learned in.
- Ensure that the demonstration is accurate and realistic.
- Arrange the demonstration so the learner can get the most from it.
- Encourage learners to ask questions and get explanation at appropriate stages in the demonstration.
- Give learners the opportunities to practise the skill being demonstrated and give them positive feedback.
- Give extra demonstrations of the skills being taught to reinforce learning.
- Ensure that demonstrations take place in a safe environment and allow learners to see the demonstration clearly.
- Respond to the needs of learners during the demonstration.
- Reduce distractions and disruptions as much as possible.

1.3 *Instruct learners*

Performance criteria

You must be able to do the following:

- Match instruction to the needs of the learners.
- Identify which learning outcomes will be achieved through instruction.
- Ensure that the manner, level and speed of the instruction encourages learners to take part.
- Regularly check that learners understand and adapt instruction as appropriate.
- Give learners positive feedback on the learning experience and the outcomes achieved.
- Identify anything that prevents learning and review this with the learners.

1.4 *Knowledge requirements*

You need to be able to show, through the results of your own workplace activities and evaluations:

General knowledge and understanding

- The nature and role of demonstrations and instruction
- the separate areas of demonstrations which encourage learning
- which types of learning are best achieved and supported through demonstrations
- how to identify and use different learning opportunities
- how to structure demonstrations and instruction sessions
- how to choose from a range of demonstration techniques

Principles and concepts

- how to put learners at their ease and encourage them to take part
- how to choose between demonstration and instruction as learning methods
- how to identify individual learning needs
- which factors are likely to prevent learning and how to overcome them
- how to check learners' understanding and progress
- how to put information in order and decide whether the language you will be using is appropriate for the learners
- how to choose and prepare appropriate materials, including technology-based materials
- the separate areas of instructional techniques which encourage learning
- which types of learning are best achieved and supported through instruction

External factors influencing human resource development

- how to make sure everybody acts in line with health, safety and environmental protection legislation and best practice

- how to analyse and use developments in learning and new ways of delivery, including technology-based learning

2 Coaching individual learners in the workplace

This guidance is applicable to you if your role involves coaching others to achieve the required skills or behaviours in the workplace.

2.1 Performance criteria

You must be able to:

- Identify individual needs and learning styles.
- Choose a style of coaching which meets the learning objectives.
- Coach in a manner and at a speed which is appropriate to the learner.
- Analyse the skills needed by the learner and the order they need to be learned in.
- Regularly check that the learner is making positive progress.
- Give learners positive feedback on their progress.
- Alter coaching in the light of the learner's progress and feedback.
- Identify anything that prevents learning and review this with the learner.

Assist individual learners to apply their learning

- Give learners the opportunities to practise skills, apply their knowledge and get experience in a structured way.
- Consider using technology-based support for learners, including e-support.
- Identify opportunities for learners to achieve agreed goals and give them positive feedback on their progress.
- Identify opportunities to use different learning opportunities and agree action with learners.
- Give learners clear and accurate information on how to apply their learning.
- Give learners positive feedback on their progress.
- Identify anything that prevents learning and review this with learners.
- Explain to learners the support that is available to them.

You need to have general knowledge and understanding of the following:

The nature and role of coaching

- how to match coaching opportunities to individual learning needs and objectives
- how to put information in order and decide whether the language you will be using is appropriate for individual learners
- the separate areas of coaching which encourage learning
- which types of learning are best achieved and supported through coaching
- how to identify the opportunities available for learners to apply their learning
- Principles and concepts
- how to put learners at their ease
- how to identify individual learning needs
- what the different learning styles are and how they affect learning

- how to identify and use different learning opportunities
- how to structure learning activities
- how to choose and prepare appropriate materials, including technology-based materials
- how to encourage learners to recognise their own achievements
- how to recognise the things that are likely to prevent learning and how to overcome them
- how to check learners' understanding and progress

External factors influencing human resource development

- how to make sure that everyone acts in line with health, safety and environmental protection legislation and best practice
- how to analyse and use developments in learning and new ways of delivery, including technology-based learning