



## **Planning and Delivering Training Sessions to Groups**

**HEOT 33**

**SCQF level 6**

### **Who is this qualification for?**

This Unit has been designed as an initial qualification for those with limited or no prior experience of planning and delivering training. It is intended for candidates with vocational expertise or subject knowledge whose job role includes the training of others in small group settings (minimum four, maximum seven learners) and in work-related learning contexts. It is also suitable for those who aspire to a training role, or who expect to have some responsibility for training as part of a future job role.

The Unit Outcomes are:

- ◆ Explain the trainer's role in ensuring learners' needs are met
- ◆ Prepare learning objectives, session plans and support materials to meet learner requirements
- ◆ Deliver planned interactive training sessions and monitor the progress and achievement of learners
- ◆ Evaluate the effectiveness of the training sessions delivered and develop own practice

### **What should I know or be able to do before I start?**

You do not require any specific qualifications prior to starting, but you should have good communication skills and command a level of English that will allow effective learning of all of the Unit Outcomes.

You should be knowledgeable and experienced in the subject area(s) that you plan to deliver and possess a genuine desire to share this knowledge and develop your skills in the planning and delivery of training.

Access to this Unit is at the discretion of the centre and you may be asked to participate in some form of initial assessment to confirm this Unit is at an appropriate level and suited to your learning goals.

## What do I need to do?

To achieve the Unit you must demonstrate your competence as a trainer when planning and delivering training sessions to small groups of learners, so you will need access to opportunities for developing and practising your skills.

As you work through this Unit, you will produce the evidence required to show that you have successfully completed each of the Outcomes. You will gain this Unit by planning and delivering one interactive training session lasting between 25 and 35 minutes. Your tutor/assessor will observe you when you are delivering your training session and along with your peers or real learners, will give you feedback on your performance to enable you to develop your future practice.

If you do not manage to meet the required marking criteria, you will be offered a re-assessment opportunity.

## What might this involve?

Each approved centre operates slightly differently. To generate evidence, you may agree to deliver a number of training sessions with colleague–delegates on a programme run for the purpose of achieving this Unit. Alternatively, you may choose to be assessed running real training sessions as part of a short course.

Where a programme of delivery including assessment is being run to meet the Outcomes of this Unit, this could take place over three or more consecutive days or, eg one day per week over a number of weeks. The mode of course delivery and follow-up assessment is at the discretion of each centre.

Centres may require you to undertake some pre-course work on the role of the deliverer and the identification of learning styles prior to commencing a delivered programme for this Unit.

Some individual course work will be required in relation to the first element of this Unit and in relation to developing session plans and associated delivery materials.

## What qualifications can I do next?

This particular Unit provides skills and knowledge relating to 'Manage Learning and Development in Groups' which is standard 6 from the National Occupational Standards in Learning and Development (2010).

Candidates gaining 'Planning and Delivering Training Sessions to Groups' could progress to the full SVQ Level 3 in Learning and Development; another option would be the Professional Development Award (PDA) Learner Support at SCQF level 7. These are just a few options from a number that are available. Your tutor/assessor can advise you about qualification options, or alternatively visit SQA's Learning and Development web page: [www.sqa.org.uk/learninganddevelopment](http://www.sqa.org.uk/learninganddevelopment).



## Guidance for tutors and assessors

The information included in the remainder of this document has been grouped under the following sections:

Section A: The Unit Specification

Section B: Evidence Requirements

Section C: Assessment Guidelines

Section D: Marking Criteria and Reporting of Assessment Outcomes

Section E: Support Notes (separate document available via SQA secure website)

In any group of learners, candidates should expect to encounter individuals with diverse learning experiences and support needs and should take this into account when planning learning experiences. Candidates must select appropriate assessment activities and consider reasonable steps or adjustments which might be necessary to allow learners to meet the assessment standard.

Centres can judge when candidates are ready to be assessed for the summative assessment in Outcome 2. Learners must practise getting as close to the stated time as possible. These practise sessions can be used for formative assessment purposes, but would not count towards achievement of the Unit.

Further advice can be found in SQA's Assessment Arrangements web pages ([www.sqa.org.uk](http://www.sqa.org.uk))

### Common terms used in this Unit

Candidate	The person undertaking this Unit.
Peers	Delegates attending a course/programme to achieve this Unit (will take on learner and peer roles).
Learner	Person who is being trained by the candidate undertaking this Unit.
Learning materials	Computer-mediated exercises, practical activities, presentations, demonstrations, posters, diagrams, handouts, suggested reading materials, web-based resources, etc.
Tutor/assessor	The person delivering to/assessing candidates who are undertaking this Unit.

## Section A: Unit specification

### Planning and Delivering Training Sessions to Groups

This section provides detailed information on the Unit specification requirements covering all four Outcomes.

**'What you must know and/or do to complete this Outcome'** and **'Evidence Requirements'** are mandatory.

This document should be referenced alongside the Assessment Guidelines, Marking Criteria and Assessment Report and detailed Support Notes that provide guidance on delivery and assessment.

<b>Planning and Delivering Training Sessions to Groups</b>	
<b>Outcome 1 What you must do to complete this Outcome</b>	<b>What you must know to complete this Outcome</b>
Explain the trainer's role in ensuring learners' needs are met	<ul style="list-style-type: none"><li>◆ The impact of different learning styles</li><li>◆ How to identify the learning needs of individuals in the group and responding effectively</li><li>◆ How promoting diversity and advancing equality leads to inclusive practice</li><li>◆ Boundaries of the trainer's role and the learner referral process</li></ul>

<b>Planning and Delivering Training Sessions to Groups</b>	
<b>Outcome 2 What you must do to complete this Outcome</b>	<b>What you must know to complete this Outcome</b>
Prepare learning objectives, session plans and learning support materials to meet learner requirements	How to: <ul style="list-style-type: none"><li>◆ Use a range of delivery methods</li><li>◆ Develop three-phase session plans</li><li>◆ Write SMART objectives</li><li>◆ Sequence learning content</li><li>◆ Introduce materials to support learning</li><li>◆ Monitor learner progress and achievement</li></ul>

<b>Planning and Delivering Training Sessions to Groups</b>	
<b>Outcome 3</b> <b>What you must do to complete this Outcome</b>	<b>What you must know to complete this Outcome</b>
Deliver planned interactive training sessions and assess the progress and achievement of learners	<ul style="list-style-type: none"> <li>◆ Prepare the environment and self for learning</li> <li>◆ Introduce training sessions</li> <li>◆ Use lesson plans in guiding learning</li> <li>◆ Use visual aids effectively</li> <li>◆ Use learning support materials</li> <li>◆ Motivate and engage learners</li> <li>◆ Manage behaviour of learners while encouraging participation</li> <li>◆ Frame and respond to questions</li> <li>◆ Use feedback to confirm achievement and develop learning</li> <li>◆ Use valid methods to monitor learners' progress and achievement</li> <li>◆ Comply with the legislative requirements relating to inclusiveness, equality and diversity</li> </ul>

<b>Planning and Delivering Training Sessions to Groups</b>	
<b>Outcome 4</b> <b>What you must do to complete this Outcome</b>	<b>What you must know to complete this Outcome</b>
Evaluate the effectiveness of the training sessions delivered and your own practice	<ul style="list-style-type: none"> <li>◆ Gather evidence to use when conducting evaluation of training sessions</li> <li>◆ Evaluate the effectiveness of the learning based on this evidence</li> <li>◆ Seek feedback from learners/peers and review your performance so that you can propose improvements for future practice</li> </ul>

## **Section B: Evidence Requirements**

### **Outcome 1**

A written or oral explanation consisting of approximately 400 words should be given in relation to:

- ◆ How your delivery of the training session promotes diversity and advances equality, leading to inclusive practice.
- ◆ How your awareness of different needs and styles influenced the way you developed and delivered training sessions for learners.
- ◆ The boundaries of your role as a trainer and when it is appropriate to refer the learner on to another source of help.

### **Outcome 2**

A session plan must be developed for an interactive training session, lasting between 25 and 35 minutes, which you will deliver in Outcome 3. The session plan must include the following six components:

- ◆ a summary of delivery methods and learner activities, devised to accommodate a diverse range of learners.
- ◆ a clear three-phase structure (introduction, development and consolidation).
- ◆ instructional objectives that are specific, measurable, achievable, relevant and time-bound (SMART).
- ◆ sequenced and logical information, grouped under suitable sub-headings.
- ◆ a list of the resources and support materials to be used throughout the training session.
- ◆ An entry showing how learner progress will be monitored and how the session will be evaluated.

The summative interactive training session should be between 25 and 35 minutes long and must include some form of group activity/exercise which you have selected or devised, using the chosen resources and materials. In the session plan, time should be allowed for the learners to complete an evaluation of the session at the end.

### **Outcome 3**

Your assessor will observe your performance as you deliver the interactive training session you have planned in Outcome 2. The observation will either take place in a simulated environment where you will be delivering training to your peers as part of a course to attain this Unit, or delivering training to 'real' learners on a topic or subject area for which you have appropriate knowledge and experience.

The session must follow a logical structure (with introduction, development and consolidation phases) and be delivered to a group comprising no less than four and no more than seven learners.

## Section B: Evidence Requirements (cont)

You must show how you prepared:

- ◆ the environment including levels of heating, lighting and ventilation
- ◆ the room layout, learning content, resources and equipment
- ◆ a three-phase session plan (to include introduction, development and consolidation phases)

The introductory phase of the training session must show you have:

- covered the domestic arrangements, ground rules, an outline of the session and relevant health and safety points
- prepared learning objectives which are SMART and clearly stated
- used appropriate method(s) to stimulate learner interest in the subject

The development phase of the training session must show you have:

- delivered the training session using a prepared session plan
- grouped learning points and sequenced them in a logical order
- used training resources and aids timeously and effectively
- used support materials which effectively consolidate learning
- used delivery methods which are interactive and appropriate to topics being delivered
- demonstrated interest in, and commitment to, the learners and the content of the training session
- applied principles of equality, diversity and inclusiveness in the delivery of the training session
- managed a balanced level of control and learner participation
- framed questions and handled responses to them appropriately
- Pace and level of delivery is generally appropriate to meet group and individual needs.

The consolidation phase of the training session must show you have:

- used appropriate methods to conclude the session and monitor learners' progress and achievement in relation to the original session objectives
- used appropriate feedback skills to promote learning and confirm achievement.

## **Section B: Evidence Requirements (cont)**

### **Outcome 4**

To help evaluate your practice as a trainer, you are required to reflect on the training session you have planned and delivered covering Outcomes 2 and 3 using the following sources:

- (i) Feedback from at least four learners on the effectiveness of the training received.
- (ii) Tutor feedback covering your overall trainer performance relating to Outcomes 2 and 3.

You must show that you have evaluated your practice as a trainer by proposing a plan for self-development, making reference to the above sources.

The plan can be a specifically devised document or be included in existing CPD Records or Personal Development Plans.

## **Section C: Assessment Guidelines**

### **Outcome 1**

The explanation may be given in a written or oral format. If the explanation is given orally, it should be recorded. The explanation may be given prior to or after completion of the other Outcomes.

### **Outcome 2**

The completed session plan should be treated as product evidence and as such should be judged in relation to all points listed under what 'each session plan must include'.

### **Outcome 3**

Information on the assessment of this Outcome is provided in Section C, in a form of 'Evidence Requirements' with a grid to facilitate marking.

The marking criteria takes account of the opportunities candidates have had to gain practise and experience as a result of undertaking this practical Unit. In this context, candidates are not expected to reach the rounded levels of competence of an experienced practitioner; however their performance levels should indicate that they can run effective training sessions unsupervised and meet the minimum standards defined in the marking criteria.

### **Outcome 4**

Feedback from at least four different learners, and feedback from the tutor/assessor, should be used to help the candidate evaluate his/her practice as a trainer and used to formulate a self-development plan for improvement purposes.

## **Section C: Assessment Guidelines (cont)**

### **All Outcomes**

For external quality assurance purposes, centres should retain a file of evidence for each candidate containing the completed Marking Criteria and Assessment Report and copies of candidate evidence relating to each of the Outcomes. An evidence reference sheet is included in the Marking Criteria and Assessment Report.

### **Section D: Marking Criteria Template**

The template below must be used to provide evidence of marking for each candidate undertaking the Planning and Delivering Training Sessions to Groups award.

The shaded boxes located in columns against each criterion denote the minimum mark that must be achieved to satisfy that criterion.

A mark of 0 against any one criterion would result in the Outcome requiring to be re-assessed.

The minimum combined score for each set of criteria relating to each Outcome is included at the bottom of each Outcome section.

To apply for certification for Planning and Delivering Training Sessions to Groups, candidates must achieve the minimum marks per Outcome and an overall score of 46 or more out of a possible mark of 66.

Marking criteria	3	2	1	0	Comments
<b>Outcome 1</b>					
<b>All four criteria relating to this Outcome must be fully met (a minimum mark of 3 for each criterion)</b>					
The impact of different learning styles				Not applicable	
How to identify the learning needs of individuals in the group and responding effectively				Not applicable	
How promoting diversity and advancing equality leads to inclusive practice				Not applicable	
Boundaries of the trainer's role and the learner referral process				Not applicable	
<b>Combined score for Outcome 1 — minimum of 12</b>					

Marking criteria	3	2	1	0	Comments
<b>Outcome 2</b>					
Candidate is well prepared in terms of the environment, room layout, resources, equipment and support materials					
Session plan meets Outcome 2 Evidence Requirements (six components)					
<b>Combined score for Outcome 2 — minimum of 5:</b>					

Marking criteria	3	2	1	0	Comments
<b>Outcome 3</b>					
<b>Introduction phase</b>					
Candidate covers domestic arrangements, ground rules, and an outline of session and health and safety points					
Learning objectives are SMART and clearly stated					
Learners' interest in the subject is stimulated using a range of appropriate methods					
<b>Development phase</b>					
Training session is delivered according to prepared session plan, using a recognisable three phase structure					
Learning points are grouped and sequenced in a logical order					
Training resources are used timeously and effectively.					
Support materials provided effectively consolidate learning.					
Delivery methods are interactive and appropriate to topics being delivered.					
Candidate demonstrated interest in, and commitment to, the learners and the content of the session.					

Marking criteria	3	2	1	0	Comments
<b>Outcome 3 (cont)</b>					
<b>Development phase (cont)</b>					
Candidate applies principles of equality, diversity and inclusiveness when dealing with learners.					
Candidate manages a balanced level of control and learner participation.					
Questions are well framed; responses to them handled appropriately.					
Pace and level of delivery is generally appropriate to meet group and individual needs.					
<b>Consolidation phase</b>					
Use appropriate methods to conclude the session and monitor learners' progress and achievement in relation to the original session objectives.					
Use appropriate feedback skills to promote learning and confirm achievement.					
<b>Combined score for Outcome 3 — minimum of 23</b>					

Marking criteria	3	2	1	0	Comments
<b>Outcome 4</b>					
<b>Both criteria relating to this Outcome must be fully met (a minimum mark of 3 for each criterion)</b>					
Gather evidence of tutor and peer feedback for evaluation purposes					Not applicable
Use gathered feedback to self-evaluate your performance and session content					Not applicable
<b>Combined score for Outcome 4 — minimum of 6</b>					

<b>Feedback on Training Session</b>
<b>Suggested areas for development</b>
<b>Areas of good practice</b>

	<b>Evidence provided</b>	<b>Evidence ref</b>
<b>Outcome 1</b>		
<b>Outcome 2</b>		
<b>Outcome 3</b>		
<b>Outcome 4</b>		

### **Outcome of Assessment**

<b>Certification</b>
<b>Re-assessment</b>

**Signed by Tutor/Assessor:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Signed by Candidate:** \_\_\_\_\_ **Date:** \_\_\_\_\_

## **Section E: Marking Scheme**

The marking scheme below provides the assessor with an explanation of how to apply marks to each criterion.

The shaded rows against specific criterion denote the minimum mark that can be awarded to that criterion.

A mark of 0 against any one criterion would result in the Outcome requiring to be re-assessed.

The minimum combined score for each set of criteria in each Outcome is included at the bottom of each Outcome.

To apply for certification for Planning and Delivering Training Sessions to Groups, candidates must achieve the minimum marks per Outcome and an overall score of 46 or more out of a possible mark of 66.

<b>Marking criteria</b>	
<b>Outcome 1</b>	
The impact of different learning styles	<b>All four criteria relating to this Outcome must be fully met (a minimum mark of 3 for each criterion)</b>
How to identify the learning needs of individuals in the group and responding effectively	
How promoting diversity and advancing equality leads to inclusive practice	
Boundaries of the trainer's role and the learner referral process	
<b>Combined score for Outcome 1 — minimum of 12</b>	

<b>Marking criteria</b>	
<b>Outcome 2</b>	
Candidate is well prepared in areas of <sup>1</sup> the environment, <sup>2</sup> room layout, <sup>3</sup> resources, <sup>4</sup> equipment and <sup>5</sup> support materials.	<b>3</b> Criteria fully met <b>2</b> Mostly met, at least four areas prepared <b>1</b> Somewhat met, three or more areas not prepared <b>0</b> Not met, no areas prepared
Session plan meets Outcome 2 Evidence Requirements (6 components).	<b>3</b> Criteria fully met <b>2</b> Mostly met, at least four components included <b>1</b> Somewhat met, three or more components are missing <b>0</b> Not met — no session plan developed/available
<b>Combined score for Outcome 1 — minimum of 5</b>	

<b>Marking criteria</b>	
<b>Outcome 3</b>	
<b>Introduction of session</b>	
Candidate <sup>1</sup> covers domestic arrangements, <sup>2</sup> ground rules, <sup>3</sup> outline of session and <sup>4</sup> health and safety points.	3 Criteria fully met 2 Mostly met, at least three points covered 1 Somewhat met, three or more points missing 0 Not met, none of these points covered in introduction
Learning objectives are SMART and clearly stated.	3 Criteria fully met 2 Mostly met - at least four components covered 1 Somewhat met, three or more components missing 0 Not met, no objectives stated
Learners' interest in the subject is stimulated using a range of appropriate methods.	3 Criteria fully met 2 Mostly met, interest is stimulated, but more could be done to fully engage learner 1 Somewhat met, very little interest in subject is stimulated 0 Trainer says/does nothing to stimulate interest in subject
<b>Development phase (session content)</b>	
Training session is delivered according to prepared session plan, using a recognisable three phase structure.	3 Criteria fully met 2 Mostly met — no more than one phase missing 1 Somewhat covered, more than two phases missing 0 Session does not follow a recognisable three phase structure
Learning points are grouped and sequenced in a logical order.	3 Criteria fully met 2 Mostly met - some points not sequenced/logical 1 Somewhat met, most points not sequenced/logical 0 Session completely lacks sequence/logic
Training resources are used timeously and effectively.	3 Criteria fully met 2 Mostly met — some resources are used at wrong time or ineffectively 1 Somewhat met, most resources are used at wrong time or ineffectively 0 Training resources are not used
Support materials provided, effectively consolidate learning.	3 Criteria fully met 2 Mostly met — materials cover most key learning points of session 1 Somewhat met, support materials cover only a few key points of session 0 No support materials used or materials do not cover any key points of session

<b>Marking criteria</b>	
<b>Outcome 3 (cont)</b>	
<b>Development phase (session content) (cont)</b>	
Delivery methods are interactive and appropriate to topics being delivered.	3 Criteria fully met 2 Mostly met, mostly interactive, some parts of session had no learner involvement 1 Somewhat met, at times interactive, learners involved during small part of session 0 No learner involvement required throughout session
Candidate demonstrated interest in, and commitment to the learners and the content of the session.	3 Criteria fully met 2 Mostly met — trainer showed reasonable commitment and interest in learners/subject 1 Somewhat met, candidate showed a modest amount of interest in learner/subject 0 No interest or commitment shown by candidate in subject/learners
Candidate applies principles of <sup>1</sup> equality, <sup>2</sup> diversity and <sup>3</sup> inclusiveness when dealing with learners.	3 Criteria fully met — principles applied in delivery practice 2 Mostly met, at least two principles applied in practice 1 Somewhat met, two principles not applied in practice 0 Principles not applied and/or practice contravenes principles
Candidate manages a balanced level of control and learner participation.	3 Criteria fully met 2 Mostly met, candidate mostly encourages participation, some opportunities missed 1 Somewhat met, candidate over-controls and does not encourage participation 0 Learners not required to participate
Questions are well framed; responses to them handled appropriately.	3 Criteria fully met 2 Mostly met, questions/responses are mostly appropriate 1 Somewhat met, only some questions/responses are appropriate 0 No questions are asked
Pace and level of delivery is generally appropriate to meet group and individual needs.	3 Criteria fully met 2 Mostly met, at times candidate has to adjust pace/level to suit learners 1 Somewhat, pace/level wrong, some attempt made to adjust 0 Pace and level wrong, not recognised, no attempt to adjust

<b>Marking criteria</b>	
<b>Outcome 3 (cont)</b>	
<b>Consolidation phase</b>	
Use appropriate methods to conclude the session and monitor learners' progress and achievement in relation to all original session objectives.	3 Criteria fully met 2 Mostly met, learner achievement is monitored against most of the original objectives 1 Somewhat met, learner achievement is monitored against some original objectives 0 Learners progress/achievement is not monitored against any original objectives
Use appropriate feedback skills to promote learning and confirm achievement.	3 Criteria fully met 2 Mostly met, feedback skills are mostly used at appropriate times 1 Somewhat met, feedback skills are sometimes used at appropriate times 0 Feedback skills are not used to promote/confirm learning.
<b>Combined score for Outcome 3 — minimum of 23</b>	

<b>Marking criteria</b>	
<b>Outcome 4</b>	
Gather evidence of tutor and peer feedback for evaluation purposes.	<b>Both criteria relating to this Outcome must be fully met (a minimum mark of 3 for each criterion)</b>
Use gathered feedback to self-evaluate your performance and session content.	
<b>Combined score for Outcome 4 — minimum of 6</b>	



## Administrative Information

### Credit value

SQA credit 1.0 (8 SCQF credit points at SCQF level 6)

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### History of changes:

Version	Description of change	Date

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