

A Fenman Video Resource

THE LEARNING PLAN INTERVIEW

by

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The Learning Plan Interview – User’s Guide

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Before you start ...

This programme follows on from the Fenman programme, *The Learning Needs Interview*. In *The Learning Needs Interview*, we followed the characters up to the point at which they demonstrated the knowledge and skills necessary to identify effectively a person's learning needs.

The Learning Plan Interview is a stand-alone programme. It is not necessary to have used the previous programme in order to use it as an effective training resource. However, it starts from the premise that the learning needs have already been identified and so it concentrates on how to put together an effective learning plan at that point. As a trainer, you will need to make sure your learners are competent to identify learning needs before using this programme. If you have not done this already by different means, you should certainly consider *The Learning Needs Interview*.

This programme does not deal with monitoring progress once the plan has been agreed, nor does it address the vital issue of reviewing and consolidating learning. These subjects form the basis of further Fenman programmes. Please call our sales department for information on monitoring and supporting learning and also on reviewing and consolidating learning. Alternatively, you can visit our web site at <http://www.fenman.co.uk>

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FOR PREVIEW ONLY

Section 1 Summary Overview

Who is this programme for?

It is for:

- Professional trainers and consultants
- Managers and supervisors who need to help their people to develop.

What does this programme do?

It helps managers to:

- Understand the reasons for holding a learning plan interview
- Understand the key principles in carrying out a learning plan interview
- Develop the skills necessary to conduct an effective learning plan interview.

Why is this programme necessary?

Because:

- Organisations have to be better at learning than they have been in the past
- The culture of learning has to be decentralised and widely spread
- Learning has to be tailored much more to individual needs
- Employees are demanding support in developing themselves
- Responsibility for development is moving on to managers.

How does the programme achieve its objectives?

- By means of a self-study programme
- By providing material for a one-hour training session
- By providing material for a half-day training session
- By providing checklists and assessment exercises
- By providing support to a range of existing courses.

Where can the programme be used?

- At home, or in a resource centre
- In an office or meeting room
- In a management training centre.

How long does the programme take?

- Two hours self-study, or
- a one-hour training session, or
- a half-day training session.

Section 2 How to use this pack

Structure of the pack

This pack has been designed for managers who wish to be able to carry out a learning plan interview with their staff and for trainers who wish to help participants to develop this ability.

The pack contains:

- A one-hour training session which can be run by a trainer or manager
- A half-day training session which can be run by a trainer
- A self-study section which a manager can work through in two hours.

All three components share a section entitled *The Manager's Guide to the Learning Plan Interview* (Section 6 - page 35) which, along with the videos, contains the key ideas about the subject.

At the end of this guide (Section 8 - page 54) is a section dealing with S/NVQs and how these relate to the pack.

What to do now

If you are a trainer, read through the whole pack to get an idea of the contents. Although we have provided structures for one-hour and half-day training sessions, you may well get ideas from different parts of the pack which you can incorporate into either your existing or new training sessions.

If you are a manager studying alone, go straight to the Self-study section and work from there.



FOR PREVIEW ONLY

Section 3 The Self-study Module

It will take you about two hours to work through this section on your own. The objectives in doing this are:

- To obtain a better understanding of the reasons for a learning plan interview
- To gain an understanding of the key principles when undertaking the interview.

Resources

- Quiet work area
- VHS player, TV and headphones, if preferred
- *The Learning Plan Interview* Tape 1 and Tape 2
- Note pad and pen/pencil.

Your background

This session is for you if you are a manager, or supervisor who has responsibility for developing your staff.

Session Plan

Activity	Time
Reasons for conducting a learning plan interview	5 mins
Watch <i>The Learning Plan Interview</i> Tape 1	20 mins
Try your hand at the quiz on the next page	5 mins
Break	10 mins
Compare and contrast two scenes from Tape 2; the wrong and the right way to conduct a learning plan interview	20 mins
Read <i>The Manager's Guide to the Learning Plan Interview</i> - Section 6	10 mins
Watch the rest of Tape 2 and answer the questions	20 mins
Do the three exercises and check your answers with ours	30 mins

Why carry out a learning plan interview?

List, on a piece of paper, all the reasons you can think of for carrying out a learning plan interview.

When you have listed your reasons, turn to page 15 to compare your list with ours.

Watch *The Learning Plan Interview* Tape 1

Make yourself comfortable, sit back, concentrate and watch the video.

You have been going for some time now. Take a break, stretch your legs & have a drink.

Quiz

Now that you have seen the video, test your memory/comprehension by answering these questions:

What does L.E.A.R.N. stand for?

What does S.O.S. stand for?

What are the two main learning style preferences?

What are some of the characteristics of Thinkers?

What are some of the characteristics of Doers?

Why is it important to be aware of someone's learning style?

Now turn to page 16 to compare your answers with ours.

Analyse Paul's two attempts to conduct a learning needs interview with Robert

Use *The Learning Plan Interview* Tape 2. This starts with a more complete version of the first interview between Paul and Robert.

Watch the first section entitled *The First Attempt* in its entirety. As you do so, use a sheet of paper and make notes on your answers to the following questions:

- What did Paul do well?
- What could Paul have done better?

When you have answered these questions, turn to page 17 to compare your analysis with ours.

Now watch the second scene, entitled *The Second Attempt* on *The Learning Plan Interview* Tape 2. This shows the second interview between Paul and Robert. Watch this in its entirety and, again, make notes on your answers to the following questions:

-
- What did Paul do well?
 - What could Paul have done better?

Turn to page 17 to compare your answers with ours.

Read *The Manager's Guide to the Learning Plan Interview*

You will find this in Section 6, page 35 of this guide.

Watch the rest of The Learning Plan Interview Tape 2

The train journey to Brussels from Waterloo takes around three hours. Paul and Marguerite had time for a great deal more discussion than we were able to show you in Tape 1.

In Tape 2, we are able to show you rather more of their discussion as well as showing the key points a second time.

Watch the next section headed **L.E.A.R.N. and S.O.S.** for a reminder of the process you should go through when putting together a plan (S.O.S.) and a reminder of the L.E.A.R.N. criteria.

Take a piece of paper and spend five minutes or so sketching out a learning plan for yourself:

Choose a single, simple learning objective and write it down:

- Is it limited and exact? If not, clarify it until it is
- Now generate a list of two or three learning opportunities
- Think about your own learning style
- Select one opportunity that fits your style
- Can you tailor it further to suit your style?

Now write down a couple of steps you can realistically take in the next day or so to ensure that you take the learning opportunity. Is your plan:

Limited

Exact

Appropriate

Realistic and focused on

Now?

Watch the next section of Tape 2 entitled **The Learning Cycle**. Marguerite describes The Learning Cycle as it applies to her golf swing. Take a few minutes to think of an example from your own learning and identify the steps - do, review, conclude, plan as they apply to you.

Which of these steps do you enjoy or feel most comfortable with? Which do you feel least comfortable with?

Watch the next section, entitled **Thinkers and Doers**. Which are you? Think of an individual on your team. Is he or she a Thinker or a Doer? If you were considering a course for this person, what characteristics would you look for in choosing an appropriate one?

Watch the final section, entitled **Tailoring Opportunities**. Think of four learning opportunities:

- On the job but requiring that you learn in order to do
- On the job but requiring you do in order to learn
- Off the job but requiring that you learn in order to do
- Off the job but requiring that you do in order to learn.

Do the three exercises

You will find these in Section 7, page 43 of this guide.

The first exercise, on page 44, helps you to clarify which characteristics go with which

learning style preference. It is important to be quite clear about this, so that you can identify your own preferences and help other people to identify theirs.

The second exercise, on page 45, helps to show you how to match different activities to the two learning styles.

The third exercise, on page 48, helps you to see what is involved in modifying a learning opportunity to obtain a tailor-made fit with someone's learning style preference.

Answers to questions

Reasons for carrying out a learning plan interview

- To 'revisit' and firm up the learning needs identified in the first interview
- To decide which learning needs are priority
- To identify the learner's learning style preference
- To identify a range of different learning opportunities
- To select learning activities that are appropriate to the learner's learning style
- To agree a learning plan which is limited, exact, appropriate, realistic and focused on now (L.E.A.R.N.)
- To demonstrate your continued interest in the learner's development and commit to holding a learning review interview.

Answers to the quiz

What does L. E.A. R. N. stand for?

- Limited
- Exact
- Appropriate
- Realistic
- Now.

What does S.O.S. stand for?

- Style
- Opportunities (Options)
- Select (Selection).

What are the two main learning style preferences?

- Thinker
- Doer.

What are some of the characteristics of Thinkers?

- Thorough
- Methodical
- Like to collect information
- Tend to be cautious
- Like to prepare carefully
- Good listeners
- Good observers • Reticent
- Like theory, structure, models.

What are some of the characteristics of Doers?

- Like to have a go
- Take risks
- Try things out
- Tend to be enthusiastic about new things
- Love practical ideas
- Extroverted
- Spontaneous
- Flexible
- Open-minded
- Creative.

Why is it important to be aware of someone's learning style?

- You need to find out if someone prefers thinking or doing as a way of learning, so that you can support the learner through the sections of The Learning Cycle with which they feel less comfortable.

Paul's first attempt

What did Paul do well?

- He started by asking Robert to recap the learning needs identified at their last meeting
- He asked Robert for his ideas on how to put together a learning plan
- He 'empowered' Robert to find an appropriate course and go on it
- He spotted that Robert was looking doubtful and asked about it
- He summarised and suggested a review to find out what had and hadn't worked.

What could Paul have done better?

- He should have limited the plan by focusing on one priority learning need rather than trying to tackle everything at once
- He should have drawn more ideas out of Robert rather than imposing his own opinions with sentences such as "I doubt if a book would be enough. I think a course would be better" and "No, I think this is one of those areas where it's best to learn by doing."
- He should have taken Robert's learning style preference into account, instead of assuming that what worked for himself would also work for Robert
- He should have explored different options rather than immediately settling on what seemed the obvious ones
- He should have found out why Robert was unhappy instead of shrugging it off and pressing on regardless.

Paul's second attempt

What did Paul do well?

- He started with an honest admission that he'd now learned more about the process of putting together a learning plan and wanted to start again
- He asked Robert to recap his understanding of the learning needs they had previously identified

-
- He invited Robert to prioritise his needs by asking “Which bit of learning would help you most in your present situation?”
 - He resisted the temptation to tackle more than one learning objective at a time
 - He helped Robert to identify his preferred learning style
 - He explained the need to put together a learning plan that played to Robert’s strengths
 - He worked with Robert to generate a list of possible learning activities and then select the ones that would work for him
 - He helped Robert to prune things down into a plan which met the L.E.A.R.N. criteria
 - He said he’d find out more about conducting the learning plan review and invited Robert to keep him informed.

What could Paul have done better?

- He should have asked Robert questions that he was capable of understanding! The most classic example of posing an unfair question was when Paul asked “Would you say that you like to learn in order to do, or that you like to do in order to learn?”

Section 4 One-hour Training Session

The objectives of this one-hour training session are:

- To help participants to appreciate the need for learning plan interviews
- To demonstrate the essential ingredients of a learning plan interview.

Inevitably, in the space of one hour, it is only possible to raise the awareness of participants. If they are to develop a deeper understanding of the key principles and some skills to help them to conduct an effective learning plan interview, you should encourage them to complete the exercises in Section 7 on a self-study basis.

Resources

- Meeting room for a small group
- TV/monitor and VHS player
- *The Learning Plan Interview* Tape 1
- Sufficient photocopies of *The Manager's Guide to the Learning Plan Interview* taken from this guide
- Flipchart or overhead transparency projector with pens and blank OHTs
- Sufficient copies of the exercises in Section 7 of this guide.

Number of participants

This short session is ideal for a small group of three to eight participants.

Participants' background

Managers and supervisors whose role includes helping their people to learn.

Session Plan

Activity	Time
Introduction to the session	5 mins
Reasons for conducting a learning needs interview	10 mins
Show <i>The Learning Plan Interview</i> Tape 1	20 mins
Explore the S.O.S. approach	12 mins
Emphasise the importance of the L.E.A.R.N. criteria	8 mins
Ending the session	5 mins

Introduce the session

Introduce the session by explaining the objectives. Emphasise that, in the short time available, these are limited and that you will end with some suggestions for some additional work that explores the subject in more depth.

Reasons for conducting a learning plan interview

Lead a discussion on reasons for the interview by posing the question:

“What would you wish to achieve during a learning plan interview?”

If you have a group of, say, six or more, you might like to split the participants into two smaller groups and give them five minutes to confer before inviting them to share their conclusions with the other group(s). If you have fewer than six people, work with the whole group and record their suggestions on a flipchart or OHT.

Besides the obvious conclusion that the reason for conducting a learning plan interview is to produce a learning plan, you'd hope to hear such things as:

- To recap learning needs
- To prioritise the learning needs
- To explore ways to meet those needs
- To help the learner to accept responsibility for their own learning/development
- To show an interest in the person's development.

Prior to watching the video, it is unlikely that participants will mention learning style preferences or be more specific about the ingredients of an effective learning plan.

Show The Learning Plan Interview Tape 1

Although it is tempting to go and do something else while the video is running, especially if you have seen it many times, we recommend that you remain and watch it yet again. Set yourself the challenge of finding some aspect that you had not fully appreciated before. There are likely to be nuances you have missed and implications that hadn't fully dawned on you.

Explore the S.O.S. approach

After showing the video, ask participants if they can remember what S.O.S. stands for. As they recall it, write on a flipchart or OHT

S for Style

O for Opportunities (Options)

S for Select (Selection).

Then work through the following three questions:

Why is it important to identify learning style preferences?

Why is it important to explore a range of options or learning opportunities?

Why is it important to select an opportunity or option?

The answers to these questions might be many and varied but in the short time available you are hoping to hear conclusions along the following lines:

Style

It is important to identify learning style preferences, so that you can appreciate whether a person learns best by thinking before doing or by doing before thinking. (If participants refer back to stages in The Learning Cycle and say that Thinkers prefer to review and conclude *before* planning and doing, whereas Doers like to plan and do *before* reviewing and concluding, then you know that they have been especially quick on the uptake and you should be well satisfied!)

Options

It is important to explore a range of options, some of which are work-based and some of which are off-the-job opportunities, so that you can help the learner to choose something appropriate. In particular, identifying a range of options opens up a variety of different possibilities and helps to avoid the tendency to jump to the conclusion that a course of some kind is the only way forward.

(A course may or may not be appropriate. Even if it is, it is best to have chosen it after weighing up the pros and cons of other possibilities.)

Select

It is important to select an opportunity or option from a range of possibilities so that the resulting learning plan is appropriate for the learner. In essence, this means matching the learner's learning style preferences to learning opportunities and finding the best fit.

Emphasise the importance of the L.E.A.R.N. criteria

Explain that plans have a nasty habit of.

- Being over-complicated with so many aspects that people too easily forget
- Seeming to be plans whereas in fact they are only laudable intentions
- Being inappropriate for the person who has to action the plan
- Being too ambitious, not taking sufficient account of what is feasible given existing circumstances - especially resources such as time
- Being too ambitious, looking too far ahead without paying sufficient attention to next steps.

Then present the L.E.A.R.N. criteria

L for Limited

- Focus on only one or two needs at a time

E for Exact

- Spell out the 'hows' precisely enough to make them actionable

A for Appropriate

- Adapt the plan to the learner's learning style preference

R for Realistic

- Check that the plan is feasible and not over-ambitious

N for Now

- Focus on a plan by which learning can start immediately.

Explain that plans which meet these criteria are far more likely to be successful.

Ending the session

Your hour will now be up. Thank everyone for their time and give each person a copy of *The Manager's Guide to the Learning Plan Interview* in Section 6.

Also give each participant a copy of the exercises in Section 7 and urge them to work through them before attempting to conduct a learning plan interview.

Section 5 Half-day Training Session

The objectives of this half-day training session are to help participants to:

- Gain an understanding of the reasons for a learning plan interview
- Gain an understanding of the key principles when undertaking the interview
- Generate ideas on different work-based learning opportunities and practise matching them to learning style preferences.

Resources

- Meeting room for a small group
- TV/Monitor and VHS player
- *The Learning Plan Interview* Tape 1 and Tape 2
- Sufficient photocopies of the following
 - Exercise 1, page 45 Section 7
 - Answers to Exercise 1, page 51 Section 7 - Exercise 2, page 46 Section 7
 - Answers to Exercise 2, page 52 Section 7
 - Learning opportunities exercise, page 31 in this section.
 - 53 ideas to help people learn and develop, pages 32 to 34 in this section
 - *The Manager's Guide to the Learning Plan Interview*, page 35, Section 6.

Number of participants

Between four and twelve

Participants' background

Managers and supervisors whose role includes helping their people to learn.

Session plan

Activity	Duration
Introduction	10 mins
Reasons for conducting a learning plan interview	10 mins
Show <i>The Learning Plan Interview</i> Tape 1	25 mins
Quiz	10 mins
Compare and contrast two scenes using <i>The Learning Plan Interview</i> Tape 2: the wrong way and the right way to conduct a learning plan interview.	30 mins
Break	15 mins
Introduction to exercises in pairs	5 mins
Exercises in pairs	35 mins
Introduction to the learning opportunities exercise	5 mins
Group exercise	40 mins
Debrief, summarise and close	30 mins

Introduction

Introduce the session by explaining the objectives and giving some indication of the contents. Emphasise the participative nature of the session and tell participants that they can look forward to carrying out exercises of various kinds.

Remind participants of the following reasons why learning has become an even more important topic than it has been in the past:

- Life is more competitive and learning helps organisations to be more flexible and responsive to changes in the market place. Learning has been described as ‘the only sustainable competitive edge’.
- Managers exist to help people to be successful. Creating the conditions where people take responsibility for their continuous learning and development is the key to that success.
- As job security decreases, the importance of a person’s marketability or ‘employability’ increases. Again, continuous learning and development is the process that results in the acquisition of new knowledge, skills and attitudes.

In short, helping people to learn, not just from the occasional course, but from a whole range of experiences and opportunities, should be a priority for every manager.

Reasons for conducting a learning plan interview

Divide your participants into small discussion groups of three to five people. Ask the following question:

“What would you want to achieve during a Learning Plan Interview?”

Allow five minutes and then ask each group in turn to give just one reason. Keep circulating round the groups until all the reasons have been shared.

Sample replies should include:

- To recap learning needs
- To prioritise learning needs
- To explore ways to meet those needs

-
- To agree a plan
 - To help the learner to accept responsibility for their own learning/development
 - To show an interest in the person's development.

Prior to watching the video, it is unlikely that participants will mention learning style preferences or be more specific about the ingredients of an effective learning plan.

Show The Learning Plan Interview Tape 1

This will take about 20 minutes. Even if you have seen it before, stay with the participants and watch it again. Look for something new that you hadn't fully appreciated before.

QUIZ

Make this fun - not at all like a test or anything threatening. Simply introduce the quiz by saying something like: "Before we analyse a couple of scenes from the video in more depth, let's see if we can remember what some of the mnemonics stood for". Divide the participants into the same groupings you used previously, so that they can confer. Then ask the following five questions and, when they have had time for discussion, invite a different group to give their answer with other groups joining in to fill in 'gaps' or help them out.

What does L. EA. R. N. stand for?

- Limited
- Exact
- Appropriate
- Realistic
- Now.

What does S.O.S. stand for?

- Style
- Opportunities (Options)
- Select (Selection).

What are the two main learning style preferences?

- Thinker
- Doer.

What are some of the characteristics of Thinkers?

- Thorough
- Methodical
- Like to collect information
- Tend to be cautious
- Like to prepare carefully
- Good listeners
- Good observers
- Reticent
- Like theory, structure, models.

What are some of the characteristics of Doers?

- Like to have a go
- Take risks
- Try things out
- Tend to be enthusiastic about new things
- Love practical ideas
- Extroverted
- Spontaneous
- Flexible
- Open-minded
- Creative
- Love practical ideas.

Compare and contrast two scenes

Use *The Learning Plan Interview* Tape 2. This shows an expanded version of the first interview between Paul and Robert, followed by the second interview between them. Show the first two sections entitled **The First Attempt** and **The Second Attempt**.

Explain that we are going to look again at the two scenes in which Paul is interviewing Robert; first the one before Marguerite had coached Paul and then the one after she had done so. Then we shall look at the differences between the two scenes. Also explain that, having watched the two scenes, each group will be asked to analyse:

- What Paul did well
- What Paul could have done better.

Encourage participants to make notes as they watch the two scenes.

Give the groups 15 minutes for their deliberations. When it comes to the reports, if you have four groups, ask the first to describe what Paul did well in the first scene, the second to describe what he could have done better in the first scene and the other two groups to do the same for the second scene. Our suggestions are given on pages 17-18 in the self-study section of this guide.

Show the next section of Tape 2 entitled **L.E.A.R.N. and S.O.S.** as a reminder of the criteria.

Break

You have been working for about an hour and three quarters, so it is time to take a break.

The Learning Cycle

Explain that Paul and Marguerite discussed several things on the train to Brussels that we have not yet seen.

Show the section of *The Learning Plan Interview* Tape 2 entitled **The Learning Cycle**.

Ask if anyone would like to try giving an example of The Learning Cycle at work from their own experience, just as Marguerite to Paul when she talked about playing golf. You would be well advised to have prepared an example yourself in case nobody volunteers!

Learning Styles

Show the next section of *The Learning Plan Interview* Tape 2 entitled Thinkers and Doers as an introduction to the exercises in pairs.

Exercises in pairs

Note: It is essential to have completed these exercises yourself before you attempt to use them in a training session.

Distribute Exercise 1 (from page 45 in Section 7) and ask participants to work in pairs, agreeing which characteristic is typical of which learning style preference. If you have an odd number, then have one trio.

As pairs finish, give them a copy of the answers (page 51 in Section 7) and ask them to check agreements and differences. Hold a quick session to clarify any puzzling items.

Aim to spend a total of 15 minutes on Exercise 1.

Then distribute Exercise 2 (from page 46 in Section 7) and, using the same pairs/trios, get them to work through the 32 activities. Again, as participants finish, issue the answers (page 52, Section 7) and hold a discussion to clarify puzzling items.

Aim to spend a total of 20 minutes on Exercise 2.

Introduction to learning opportunities exercise

Show the final section *The Learning Plan Interview* Tape 2 entitled **Tailoring Opportunities**.

Introduce the exercise by reminding participants that identifying different ways to meet learning needs is a vital part of the learning plan interview. This is the 'O' in the S.O.S. formula. Explain that, as we saw in the video, there is a widespread tendency to assume that learning inevitably means going on a course of some kind. However, once we start to think about learning opportunities, we realise that there are many that can be utilised, both at work and away from it.

The idea of this exercise is to generate ideas beyond 'going on a course' and, in particular, to focus on work-based opportunities that could be incorporated into peoples' learning plans. Split participants into two groups and give them the exercise brief on page 31. Hold back the list of *53 ideas to help people learn and develop* (pages 32-34), but have copies ready to distribute after groups have had time to brainstorm their own ideas. Remind participants of the timings:

- 15 minutes to brainstorm ideas
- 10 minutes to read through the list of 53 ways
- 15 minutes to select three Thinker and three Doer activities.

Debrief, summarise and close

Ask each group to present their ideas on work-based learning opportunities. If necessary, ask them to expand on why they consider an opportunity to be appropriate to a Thinker or a Doer.

Remind them that, even though the exercise invited them to focus on work-based opportunities, there are plenty of off-the-Job ones, including attending courses, conferences, workshops and seminars. These all have a part to play, but since people spend the majority of their time doing their normal work, it is especially useful to identify the different learning opportunities that crop up there.

Finish by summarising the main points that have come out of the session and give out copies of *The Manager's Guide to the Learning Plan Interview* - Section 6.

Thank participants for their time and close the session.

Learning Opportunities Exercise

This exercise is in four phases:

1. Start by focusing on your working situations and the opportunities they provide to learn and develop. Brainstorm ideas that any manager in any organisation could use to provide people with learning opportunities. Don't be constrained at this stage with what is necessarily realistic or feasible. Just relax and produce as long a list as you can in 15 minutes.
2. After you have finished your brainstorm, you will each be given a list of ideas that other people in previous brainstorming sessions have thought of. The list is in no order of importance. The items are numbered merely to make it more convenient to refer to them. Individually, spend 10 minutes going through the list and marking the ones that initially you think are promising.
3. Now work together to select three work-based opportunities suitable for someone with a Thinker learning preference and another three suitable for someone with a Doer learning preference. Spend no more than 15 minutes making your selections.
4. Finally, present your six learning opportunities to the other group(s) explaining why you consider them to be useful learning opportunities:
 - For Thinkers
 - For Doers.

53 Ideas to Help People to Learn and Develop

1. Collaboratively analyse mistakes to see what can be learned from them
2. Hold frequent question and answer sessions
3. Ask people to list options and the consequences of each
4. Ask people for their advice “What would you do if... ?”
5. Ask people what they have learned today and what they are going to do better/differently tomorrow
6. Have a challenging assumptions session/play devil’s advocate
7. Give people extra/different responsibilities while covering for holidays
8. Give people an interesting project to tackle over and above their normal job
9. Ask people for ideas on how to improve work practices and processes (i.e. instigate your own mini suggestions scheme)
10. Delegate not just to get the job done but to give someone a development opportunity
11. Hold gripe sessions and then challenge people to come up with ideas to overcome the causes of dissatisfaction
12. Ask someone to do your in-tray for you and review with them the decisions they make
13. Ask people to keep learning logs and hold learning reviews
14. Keep quiet and let people have their say first
15. Have collaborative decision making sessions
16. Make changes not for change’s sake but for learning’s sake
17. Praise someone at least once each week for a specific thing they have done well
18. Rotate the job of chairperson at meetings

-
19. Hold 'What if...?' planning sessions
 20. Ask people to give presentations
 21. Give people long reports to summarise into one-pagers
 22. Give people relevant articles, newspaper cuttings, books to read and report back on
 23. Use conflict resolution as an opportunity to learn about win-win outcomes
 24. Set agreed, but tight, deadlines and hold people to them
 25. Ask people to set their own targets/goals/objectives and then agree them with you
 26. Give people the opportunity to talk you through their day
 27. Ask other people to paraphrase what you or someone else has just said
 28. Persuade people to visit parts of the organisation they don't know
 29. Ask people to write their own job description and agree it with you
 30. Set people challenges that stretch them
 31. Make people budget holders
 32. Ask people to write down their values and share them with their colleagues
 33. Keep a departmental scrapbook in which anyone can put anything relevant and interesting
 34. Ask people to design and conduct customer satisfaction surveys
 35. Have regular 'confessionals' where it is safe for people to admit to mistakes and explore ways to avoid their repetition
 36. Ask people to produce creative captions for topical photographs from the company magazine and/or newspapers
 37. Hire training videos and ask people to do thorough critiques and extract tips and techniques for action
 38. Take a controversial work topic and organise a 'for and against' debate
-

-
39. Solicit feedback from people about how you are supervising/managing
 40. Set people the challenge of enriching their own jobs
 41. Persuade people to experiment with new and different ways of doing things
 42. Give people self-development 'venture capital' & get them to justify the way they spent it
 43. Have peer feedback sessions
 44. Ask people to say three things they like about an idea for change before being allowed to state one concern
 45. Persuade people to give outside talks to local schools, voluntary organisations, etc.
 46. Have a regular slot where a person is put in the 'hot seat' and interviewed in depth about the work they do
 47. Instigate learning 'circles' where people regularly meet to review their experiences and learn from each other
 48. Have a learning notice board where people post notices saying what they've learned this week and plan to do better next week
 49. Fix everyone up with a mentor, i.e. someone they do not normally work with, who they can use as a helpful sounding board
 50. Ask people to set their own monthly self-development plans and agree how you can help them to achieve them
 51. Have a thought-provoking motto, slogan or quotation that changes every week
 52. Ask people to write their own personal mission statements
 53. Coach people and give them feedback on their performance.

Section 6 The Manager's Guide to the Learning Plan Interview

What is the learning plan interview?

It is a discussion between you, the manager, and a subordinate colleague, the learner, to agree with him or her how best to acquire the skills, knowledge and attitudes you have previously identified as learning needs.

Why have a learning plan interview?

- To help the learner to identify his/her learning style preference
- To select appropriate learning opportunities, on and/or off-the-job
- To agree how best to meet the learning need that has been identified and firm up a specific plan to accomplish the learning.

As we shall see, it is absolutely vital to understand a person's preferred learning style, so that suitable learning opportunities are built into the plan. Learning plans that fail to gear opportunities to styles are unlikely to work out in practice.

Helping people to identify their learning style preferences (of which they are probably unaware) is therefore an important part of the learning plan interview. Without that, it is too much of a gamble whether the plan will hit or miss.

When should you have a learning plan interview?

The answer to this question is a few days after you have had a learning needs interview. It is best to separate the two discussions to allow time for any second thoughts, additions or modifications about the learning needs which are to be converted from 'whats' to 'hows' during the learning plan interview.

The key principle

The key principle is to establish how the learner prefers to learn and then select, from a range of possible options, learning opportunities that are compatible with his or her learning style preference. This does not necessarily mean going along with what the learner suggests; he or she may not be aware of learning style preferences and blinkered when it comes to the range of possible opportunities. It is quite common, for example, for people to equate learning with going on a course of some kind. Courses obviously have their part to play but there are many other types of learning opportunity that might be more appropriate.

So, the process should be:

- **S for Style**
help the learner to identify their learning style preference
- **O for Opportunities (Options)**
help the learner to identify a range of different learning opportunities
- **S for Select (Selection)**
help the learner to choose a learning opportunity that is geared to their learning style.

A learning plan interview will have been successful only if you and the learner work together through the S.O.S. process and agree a plan which meets the L.E.A.R.N. criteria (see below).

Use the checklist of learning opportunities on pages 41-43 to explore the range of options before you make your selection.

The other principles: the L.E.A.R.N. criteria

Plans of any kind, not just learning plans, have a nasty habit of:

- Being too complicated with too many aspects that people too easily forget
- Seeming to be plans when really they are only laudable intentions
- Being inappropriate for the person who has to action the plan
- Being too ambitious by not taking sufficient account of what is feasible given existing circumstances - especially resources like time
- Being too ambitious by looking too far ahead without paying sufficient attention to next steps.

The best way to survive all these perils is to use the L.E.A.R.N. criteria:

- **L for Limited**

Be ruthlessly selective and focus on one or two plans simultaneously. Remember the advice about how best to eat an elephant - in mouth-sized chunks. The same advice applies to learning plans - tackle one mouthful before moving on to another, then another until eventually the whole thing has been accomplished without getting indigestion.

- **E for Exact**

The more exact the plan can be, the more likely it is a real plan rather than an intention. The difference between the two is specificity. So dot the i's, cross the is and make sure the 'bows' are spelled out precisely enough to make them truly achievable.

- **A for Appropriate**

As we've already said, the best way to ensure the appropriateness of a learning plan is to gear it to the learner's learning style preferences. More about this in the next section when we look in more detail at the learning process and learning styles.

- **R for Realistic**

Plans that are over-ambitious, and therefore unrealistic, simply don't get implemented successfully. Check that the plan is feasible taking the learner's current circumstances into account.

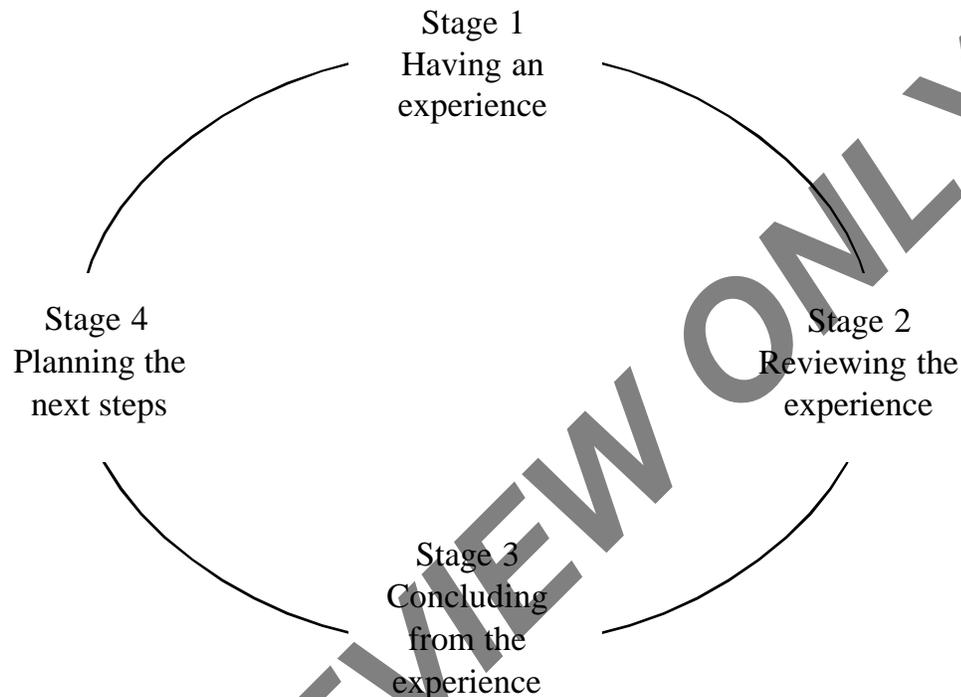
- **N for Now**

Concentrate on agreeing a learning plan that can be implemented immediately. Having a longer term aim or objective is fine but the best plans are ones that don't involve a wait before implementation. Focus on a plan where learning can start today, tomorrow, this week - certainly within a maximum of two weeks.

Plans that meet the L.E.A.R.N. criteria are far more likely to be implemented successfully.

The Learning Cycle and learning styles

Learning is a process and, like all processes, it is possible to break it down into its constituent parts. Imagine a circle with four steps or stages at the four points of a compass.



There are three crucial things to understand about The Learning Cycle:

- First, it comes as a total package. In other words, learning is incomplete if any stage is missed. Suppose, for example, you went on a leadership course and had plenty of experiences, but no time to reflect on them or to make any action plans. This would leave you having had an ‘interesting’ time, probably with some tentative conclusions about leadership, but with little else to incorporate into your work as a manager.
- Second, it is a continuous process which means you can start anywhere on the cycle. You could begin, for example, at stage 2 by acquiring some information and pondering upon it before reaching some conclusions at stage 3 and deciding how to apply them at stage 4. On the other hand, you could start at stage 4 with a technique you plan to incorporate into your *modus operandi*. Using the technique would then be stage 1 in the cycle, reviewing how it worked out stage 2, reaching conclusions stage 3, and modifying the technique in the light of your experience would be stage 4. So learning is a continuous, iterative

process and the four stages, experiencing, reviewing, concluding and planning, are mutually supportive. Each stage plays an equally important part in the total process.

- Third, people's learning style preferences incline them to be more favourably disposed towards some stages in the cycle and less comfortable with others. People with a preference for a Thinking style are happier at stages 2 and 3, whereas people who prefer a Doing style are happier at stages 4 and 1.

This is because:

People with a preference for the Thinking learning style • Are thorough and methodical

- Love collecting data
- Are cautious
- Like to prepare carefully
- Love structure, models, frameworks.

These preferences equip them better to review and conclude than to plan and do.

People with a preference for a Doing learning style

- Have a go/take risks
- Try things out in practice
- Are enthusiastic about new things
- Love practical techniques
- Are extroverts.

These preferences equip them better to plan and do than to review and conclude.

As we have already seen, effective learning means that all the stages in The Learning Cycle have to be tackled. Knowledge of someone's learning style preferences helps you to know where best to start the clockwise journey round The Learning Cycle; at stage 2 for Thinkers, at stage 4 for Doers.

In summary

Thinkers like to learn in order to do

Doers like to do in order to learn.

Try your hand at spotting which characteristics go with which learning style preference by completing the exercise on page 45.

Learning opportunities

In a sense **everything** that happens, planned or unplanned, nice or nasty, provides an opportunity to learn. Some opportunities are work-based, for example a delegated task, while others occur away from the job, for example when attending a course or engaging in some extra-mural activity.

Opportunities are therefore numerous, once you start to look at everything that happens from a learning perspective. The skill lies in matching opportunities to learning style preferences so that they are tailored to the needs of the learner. When this step is missed, the learner is often left struggling with an inappropriate opportunity, feeling stupid while other people with different learning style preferences are flourishing. It is a classic 'horses for courses' dilemma.

Generally speaking, opportunities with the following characteristics best suit people with Thinker learning style preferences:

- Plenty of data to read and research
- Preparation time
- Listening and observing
- Clear structure and objectives
- Plenty of concepts and models
- Logical sequencing.

Whereas people with Doer learning style preferences are best suited to opportunities with the following characteristics:

- Plenty of variety
- A good deal of involvement/participation
- Proven techniques
- Spontaneity
- Relevant activities
- Tips from a credible expert.

Try your hand at spotting which learning opportunities complement which learning style preferences by completing the exercise on pages 46-48.

The steps to a successful interview

As with any interview, it is sensible to break the discussion down into steps.

The steps are:

- Create a suitable, relaxed, cooperative atmosphere
- Recap the learning needs identified in the first interview
- Use the S.O.S. formula to help the learner to identify his or her learning style preference, identify a range of different learning opportunities and select an opportunity that is geared to his or her learning style.
- Agree a learning plan that meets the L.E.A.R.N. criteria
- Summarise and agree the contents for the plan
- Decide when you will meet to conduct the learning review interview.

A checklist of learning opportunities

Since **anything** that happens can be turned into a learning opportunity, it is not possible to produce an exhaustive list. However, here is a starter list which will help to trigger some thoughts of your own. The best learning opportunities are often ones where it is possible to ‘piggyback’ learning on the shoulders of an activity that already occurs in the normal course of events. This results in a double-value formula where something useful is achieved and something useful is learned.

Analysing mistakes
Analysing successes
Assignments
Attending conferences or seminars
Being coached or counselled
Being mentored
Brainstorming
Briefing groups
Budgeting
Case studies
CD Roms/interactive videos
Championing and/or managing changes
Computer-based training
Covering for holidays
Critical incidents

Dealings with colleagues and peers
Dealings with subordinates
Dealings with your boss
Debates
Delegated tasks
Demonstrations
Discussion groups
Distance learning
Domestic life
Familiar tasks
Fish bowls
Games
Giving a presentation
Helping someone else to learn
Interviewing
In-tray exercises
Job change in a new function
Job change within same function
Job rotation
Lectures/talks/presentations
Malting decisions
Meetings
Negotiating
Networking
On-the-job instruction
Open learning centres
Participating on a course or workshop
Performance appraisals
Planning
Programmed instruction
Project work
Reading
Role-playing
Same job with additional responsibilities
Secondments
Self-study
Sensitivity training
Simulations Solving
problems
Trips/visits
Unfamiliar tasks

Voluntary work
Watching a training video
Working in groups/teams
Working with consultants.

The above checklist contains 60 potentially useful learning opportunities. Don't forget, an opportunity that, at first sight, appears better suited for a Thinker or a Doer can, with a bit of thought, be modified to accommodate a particular learning style preference. Since all the stages in The Learning Cycle need to be accomplished, it is only a question of where you start - with a Thinking or a Doing activity.

Section 7 : Three Useful Exercises

This section contains three exercises:

Exercise 1: Which characteristics go with which learning style preference?

Exercise 2: Learning opportunities and learning style preferences.

Exercise 3 : How to modify an opportunity to obtain a tailor-made fit with a learning style preference.

Our answers to these exercises, together with some explanations, are given at the end of this section so that you can compare your conclusions with ours. However, agreeing with our answers is less important than the process of tackling an exercise and seeing what is involved. The learning is more in the journey than the destination!

Exercise 1:

Which characteristics go with which
learning style preference?

Consider the following characteristics and mark each box with for Thinker or for Doer:

- | | |
|--------------------------------------------------------------|------------------------------------------------------------------|
| 1 <input type="checkbox"/> Flexible/open-minded | 2 <input type="checkbox"/> Practical/realistic |
| 3 <input type="checkbox"/> Careful/cautious | 4 <input type="checkbox"/> Experiments/tests |
| 5 <input type="checkbox"/> Creative/' lateral' thinker | 6 <input type="checkbox"/> Rational/objective |
| 7 <input type="checkbox"/> Attracted to techniques | 8 <input type="checkbox"/> Has a go! |
| 9 <input type="checkbox"/> Logical/'vertical' thinker | 10 <input type="checkbox"/> Good listener |
| 11 <input type="checkbox"/> Attracted to new/novel things | 12 <input type="checkbox"/> Disciplined approach |
| 13 <input type="checkbox"/> Good observer | 14 <input type="checkbox"/> Asks probing questions |
| 15 <input type="checkbox"/> Spontaneous | 16 <input type="checkbox"/> Irritated by esoteric theories |
| 17 <input type="checkbox"/> Quiet/reticent | 18 <input type="checkbox"/> Likes structure/certainty |
| 19 <input type="checkbox"/> Suspicious of feelings/intuition | 20 <input type="checkbox"/> Hates ambiguity/uncertainty |
| 21 <input type="checkbox"/> Loves data/facts | 22 <input type="checkbox"/> Enjoys being the centre of attention |
| 23 <input type="checkbox"/> Likes time to prepare | 24 <input type="checkbox"/> Likes to see the relevance |

Exercise 2:

Learning opportunities and learning style preferences

Here are 32 characteristics of learning opportunities.

In the light of the two different learning style preferences, which of the following opportunities would best suit which style? Indicate this in the box beside each characteristics as follows:

T for Thinker

D for Doer

1. There are things to read in preparation and time to prepare
2. Things are rational, logical, well argued and 'watertight'
3. It is appropriate to 'have a go' with the minimum of preparation and thought
4. There are lots of practical examples and anecdotes illustrating 'dos and don'ts'
5. There is an opportunity to grab the limelight, i.e. give a presentation, lead a discussion
6. There are intellectual challenges, i.e. analysing a complex case study, being asked searching/probing questions in a tutorial, being tested, understanding something in depth
7. There is an opportunity to ponder and mull over data or an event
8. There are obvious and immediate opportunities to implement/use whatever has been learned

-
9. Both the situation and the people are familiar, i.e. it is perceived as low risk
10. There are plenty of techniques, i.e. proven, practical ways of doing things
11. There is a short 'here and now' interactive session, i.e. a role-playing exercise, a task to tackle in teams/groups
12. There is an opportunity to analyse and then generalise the reasons for success or failure
13. There is something new and different to try
14. There are plenty of opportunities to practise techniques with coaching/feedback from a credible expert, i.e. someone who has a proven track record
15. There are plenty of interesting ideas and concepts (even though they may not appear immediately relevant)
16. There is a 'now get out of that' type challenge, i.e. a problem to solve with inadequate resources and/or in adverse conditions
17. There is a high face validity in the activity, i.e. a good simulation, 'real' problems
18. Everything seems relevant and to the point
19. There is an opportunity to think before acting, to assimilate before commenting
20. There are opportunities to plan the implementation of what has been learned
21. There is an opportunity to brainstorm and produce off-the-top-of-the-head ideas
22. Things are well organised with a clear purpose and structure

-
23. There is an opportunity to review what happened and listen to different perceptions and points of view
24. There is plenty of time, i.e. no 'impossible' deadlines and undue time pressures
25. The activity is participative with lots of opportunities to join in spontaneously
26. There is an opportunity to stand back from events and listen or observe, i.e. taking a back seat in a discussion, watching a group at work
27. There are opportunities to explore methodically the associations and inter-relationships between ideas, events and situations
28. Connections and links are made between the theory and the practice
29. There are opportunities to question and probe the basic methodology, assumptions or logic behind something, i.e. by taking part in a question and answer session, by checking a paper for inconsistencies
30. What is being offered is part of a system, model concept, theory
31. There is excitement/drama/crisis and things chop and change with a range of diverse activities to tackle
32. There is an opportunity to gather lots of data from a variety of different sources

Exercise 3:

How to modify an opportunity to obtain a tailor-made fit with a learning style preference

Look down the checklist of potential learning opportunities on page 41 and identify three that are readily available in your environment. Write the opportunity at the top of a piece of paper and divide the page into two columns. In the left-hand column make notes on actions you could take to tailor-make the opportunity for someone with a Thinker learning style preference; do the same in the right-hand column for those with a Doer learning style preference. We have given you some examples below and overleaf:

Analysing mistakes

Thinker	Doer
Give adequate notice and some preparation time	Be an opportunist and use recent mistakes as a trigger for the session
Focus on just one mistake and aim to do a thorough job	Focus on a number of different mistakes (variety)
Have plenty of data to analyse to get at the causes of the mistake	Brainstorm possible reasons for the mistakes (spontaneity)
Use a structured, logical approach with more time spent on analysis than on solutions	Use a proven technique to generate options on how to fix the problems and prevent their recurrence

Attending a conference or seminar

Thinker	Doer
<p>Give time for the person to consider the objectives and contents of the conference</p>	<p>Don't attempt to pin the person down to specific learning objectives; just encourage them to approach the conference with an open mind</p>
<p>Hold a pre-briefing session to agree some learning objectives</p>	<p>Make sure the conference isn't all 'chalk and talk' and that there are plenty of opportunities for participation</p>
<p>Make sure the conference will contain plenty of sound theories, frameworks and models</p>	<p>Make sure the conference speakers are credible experts who have a proven record of achievement</p>
<p>Make sure the conference will provide comprehensive handouts and supporting documentation</p>	<p>Make sure the conference design has short, punchy sessions</p>
<p>Make sure the conference design has built-in time for networking and reflection.</p>	<p>Debrief with less emphasis on what has been learned and more emphasis on practical applications.</p>
<p>Have a thorough debrief to review 'lessons learned'.</p>	

Our answers to the exercises

Exercise 1: Which characteristic goes with which learning style preference?

We have sorted the characteristics into two groupings as follows;

Thinker characteristics

- (3) Careful/cautious
- (6) Rational/objective
- (9) Logical/'vertical' thinker
- (10) Good listener
- (12) Disciplined approach
- (13) Good observer
- (14) Asks probing questions
- (17) Quiet/reticent
- (18) Likes structure/certainty
- (19) Suspicious of feelings/intuition
- (21) Loves data/facts
- (23) Likes time to prepare

Doer characteristics

- (1) Flexible/open-minded
- (2) Practical/realistic
- (4) Experiments/tests
- (5) Creative/'lateral' thinker
- (7) Attracted to techniques
- (8) Has a go!
- (11) Attracted to new/novel things
- (15) Spontaneous
- (16) Irritated by esoteric theories
- (20) Hates ambiguity/uncertainty
- (22) Enjoys being the centre of attention
- (24) Likes to see the relevance

People are, of course, complex and rarely fit squarely into one category or another. Often circumstances may mean that someone with a Thinker preference is 'forced' to behave more like a Doer and vice versa. Sometimes people develop a level of comfort with all the stages in The Learning Cycle such that they can switch and at different times behave like a Thinker or a Doer. Generally speaking, however, (despite the obvious risk of producing caricatures) people's preferences invariably evidence themselves in their characteristic ways of behaving.

Exercise 2: Learning opportunities and learning style preferences

We have sorted the learning opportunities into two groupings as follows:

Opportunities best suited to Thinker preferences

- (1) There are things to read in preparation and time to prepare
- (2) Things are rational, logical, well argued and 'watertight'
- (6) There are intellectual challenges, i.e. analysing a complex case study, being asked searching/ probing questions in a tutorial, being tested, understanding something in depth
- (7) There is an opportunity to ponder and mull over data or an event
- (9) Both the situation and the people are familiar, i.e. it is perceived as low risk
- (12) There is an opportunity to analyse and then generalise the reasons for success or failure
- (15) There are plenty of interesting ideas and concepts (even though they may not appear immediately relevant)
- (19) There is an opportunity to think before acting, to assimilate before commenting
- (22) Things are well organised with a clear purpose and structure
- (23) There is an opportunity to review what happened and listen to different perceptions and points of view
- (24) There is plenty of time, i.e. no 'impossible' deadlines and undue time pressures
- (26) There is an opportunity to stand back from events and listen or observe, i.e. taking a back seat in a discussion, watching a group at work
- (27) There are opportunities to explore methodically the associations and interrelationships between ideas, events and situations
- (29) There are opportunities to question and probe the basic methodology, assumptions or logic behind something, i.e. by taking part in a question and answer session, by checking a paper for inconsistencies
- (30) What is being offered is part of a system, model concept, theory
- (32) There is an opportunity to gather lots of data from a variety of different sources

Answers to Exercise 2 (continued)

Opportunities best suited to Doer preferences

- (3) It is appropriate to 'have a go' with the minimum of preparation and thought
- (4) There are lots of practical examples and anecdotes illustrating 'dos and don'ts'
- (5) There is an opportunity to grab the limelight, i.e. give a presentation, lead a discussion
- (8) There are obvious and immediate opportunities to implement/use whatever has been learned
- (10) There are plenty of techniques, i.e. proven, practical ways of doing things
- (11) There is a short 'here and now' interactive session, i.e. a role-playing exercise, a task to tackle in teams/groups
- (13) There is something new and different to try
- (14) There are plenty of opportunities to practise techniques with coaching/feedback from a credible expert, i.e. someone who has a proven track record
- (16) There is a 'now get out of that' type challenge, i.e. a problem to solve with inadequate resources and/or in adverse conditions
- (17) There is a high face validity in the activity, i.e. a good simulation, 'real' problems
- (18) Everything seems relevant and to the point
- (20) There are opportunities to plan the implementation of what has been learned
- (21) There is an opportunity to brainstorm and produce off-the-top-of-the-head ideas
- (25) The activity is participative with lots of opportunities to join in spontaneously
- (28) Connections and links are made between the theory and the practice
- (31) There is excitement/drama/crisis and things chop and change with a range of diverse activities to tackle

The short lists that follow provide the key to matching opportunities to learning style preferences. If you bear these few criteria in mind, it becomes relatively easy to see how to cater for different preferences.

Generally speaking, opportunities with the following characteristics suit people with Thinker learning style preferences:

- Plenty of data to read and research
- Preparation time
- Listening and observing
- Clear structure and objectives
- Plenty of concepts and models
- Logical sequencing.

Whereas people with Doer learning style preferences are best suited to opportunities with the following characteristics:

- Plenty of variety
- Lots of involvement/participation
- Proven techniques
- Spontaneity
- Relevant activities.

FOR PREVIEW ONLY

Section 8 National Vocational Qualifications and Scottish Vocational Qualifications

For readers outside Great Britain

In Great Britain, we have a system of National Vocational Qualifications - known as NVQs or SVQs for short. *The Learning Plan Interview* has been written bearing this system in mind. However, the content is not linked exclusively to this system. If you are overseas, you can ignore this section, other than for interest.

For readers in Scotland

We have used the abbreviation NVQ rather than S/NVQ. We believe that what we say about NVQs applies equally to their Scottish counterparts.

The awarding body for Training and Development NVQs

The Institute of Personnel and Development is the awarding body for NVQs in Training and Development. You should contact the Institute of Personnel and Development directly for their publications on acquiring NVQs. Their address is: **Institute of Training and Development, Awarding Body, IDP House, Camp Road, Wimbledon, London SW19 4UX**. This is the only way to obtain authoritative and up-to-date information on their National Vocational Qualifications. The information in this Fenman guide is for guidance only. It is not authorised by the IPD. Fenman believes it to be accurate and correct but you must not rely on it when planning your qualification.

The learning needs interview and NVQs

An NVQ in Training and Development is made up of a number of units and each unit is made up of a number of elements. If you obtain the requisite number of units, you will qualify for an NVQ in Training and Development. However, you do not need to complete an NVQ to get value from the system. Certificates are awarded for individual units. Furthermore, we are seeing the growth of 'unitisation' in qualifications. This means that

people are putting together personal portfolios of qualifications consisting of units from several different NVQs. For example, you may wish to have several units from the MCI (the awarding body for Management Qualifications) and one or two specialist units from NVQs such as Training and Development.

Although ‘unitisation’ was not the primary aim of the system when it was conceived, it is turning out to be one of its great strengths.

NVQs are awarded on the basis of evidence of competence. It does not matter how much you know about a subject. To obtain an NVQ, or part of an NVQ, you must show that you can actually complete the task in question to a set standard. So mere study of a programme such as *The Learning Plan Interview* cannot move you towards a qualification. What it can do is help you to acquire the knowledge that you need in order to perform competently.

Which units?

The Learning Plan Interview incorporates knowledge that would be useful in a number of units making up the NVQ. Two that are especially relevant are:

A21- Identify individuals’ learning aims, needs and styles

and

B21 - Design learning programmes to meet learners’ requirements

A21 is mostly concerned with identifying the needs of learners, rather than with an actual plan to meet those needs. The knowledge aspects of this unit are very thoroughly covered by the companion programme, *The Learning Needs Interview*, which is also available from Femnan. However, *The Learning Needs Interview* stops short of a consideration of learning styles. *The Learning Plan Interview* addresses the issue of styles directly. The two programmes together provide an excellent underpinning for Unit A21.

B21 is concerned with creating a learning plan once the needs of the learner have been identified. As such, it is directly addressed by *The Learning Plan Interview*. The unit requires the candidate to demonstrate knowledge of a range of methods for meeting different learning needs as well as an ability to integrate different learning opportunities into a coherent learning programme. The competencies required include generating a range of options to meet any given need and the ability to make selections based on the learner’s particular situation. *The Learning Plan Interview* addresses all these issues.

The programme stops short of monitoring and review of learning. These are required for Unit B21 and they will be addressed in the Fenman programme currently under development which deals with *The Learning Review Interview*. It is quite possible that this will be available by the time you read this, so do please call our Sales Department for up-to-date information, or visit our web site at <http://www.fenman.co.uk>

Other relevant Fenman programmes

Good Question, which deals with interview and questioning techniques, *Feedback Techniques*, *Reviewing Performance* and *Constructive Criticism* all contain material which is relevant to NVQs in Training and Development.

Further reading

The Manual of Learning Styles, 3rd Edn., Peter Honey and Alan Mumford, Peter Honey, Maidenhead (1992) ISBN 0 9508444 7 0

Using Your Learning Styles 3rd Edn., Peter Honey and Alan Mumford, Peter Honey, Maidenhead (1995) ISBN 0 9508444 1 1

Both the above publications are available from:

Dr. Peter Honey
Ardingly House
10 Linden Avenue
Maidenhead
Berkshire SL6 6HB

Finally, after this section, we have included a **Model Learning Plan Form** which you are welcome to use when designing your own. You may also use it as it stands. **Keep a copy of this plan for yourself and give a copy to the learner.**

The Model Learning Plan Form

Name of learner:

1. Select a priority learning need and write it in the space below

2. S for Style

Use the two checklists below to help the learner decide whether he/she has Thinker or Doer preferences. Tick the descriptions that apply:

Thinker preferences

- Thorough and methodical
- Loves collecting data
- Tends to be cautious
- Likes to prepare carefully
- Good listener
- Good observer
- Reticent
- Loves structure, models, frameworks

Doer preferences

Has a go/takes risks

Tries things out in practice

Enthusiastic about new things

Loves practical techniques

Extroverted

Spontaneous

Flexible

Open-minded

Creative

3. O for Opportunities (Options)

Together with the learner, consult the list of learning opportunities on page 41 of *The Manager's Guide to the Learning Plan Interview* and use the space below to note down some suitable options:

4. S for Select (Selection)

In consultation with the learner, select a learning opportunity which takes account of his/her learning style preference and will meet the learning need identified in 1 on page 58.

5. Use the following criteria to firm up a learning plan

- L for Limited**
- E for Exact**
- A for Appropriate**
- R for Realistic**
- N for Now.**

Write the details of the plan in the box below:

FOR PREVIEW ONLY

6. Agree a date for the learning review interview

Signature of learner:

Department:

Signature of manager:

Date: