

Competency	Performance Criteria	Evidence Guide
<p>1. Prepare the training plan</p>	<p>1.1 A training plan is created that includes the training budget, needs, audience, entrance criteria, management/supervisory support, training goals and objectives, assessment and evaluation tools, training sessions (lesson plans) and agendas, and the applicable manuals and workbooks.</p> <p>1.2 A needs analysis is conducted to determine the skills gap, and the training plan is established to fill those gaps.</p> <p>1.3 A task analysis is conducted to determine the training plan objectives and to establish the expected performance criteria.</p> <p>1.4 Appropriate tools and the training method are selected to ensure the objectives in the training plan are met.</p> <p>1.5 Appropriate assessment tools are selected for use throughout the training plan and at training completion to ensure 1) the candidates gain the skills required to meet the performance criteria, and 2) the training methods used are effective.</p> <p>1.6 Time management skills are used to ensure adequate time allocations for each part of the training plan (lesson plans and agendas), to determine the overall session time and how many sessions may be required.</p> <p>1.7 The training plan is confirmed with relevant personnel, and all roles and responsibilities of personnel involved in the training process are agreed upon and verified.</p> <p>1.8 Record keeping and/or reporting procedures for the training are confirmed.</p>	<p>Provide a complete training plan (1.1). The training plan may consist of a training plan proposal provided to a client or manager. The plan submitted must include the following elements:</p> <ul style="list-style-type: none"> • Documentation of the budget, audience (who should take the training), entrance criteria (pre-requisites for taking the training), support of management or supervisors (where appropriate). (1.1, 1.7) • A list of training objectives and documentation of a needs analysis for establishing these objectives. (1.2) • A list of expected performance criteria and documentations of a task analysis for establishing these goals (1.3). Include any documentation used to create the objectives and performance criteria such as job descriptions, industry standards of performance, etc. • Examples of the tools selected for the lesson plans or descriptions of the methods and tools. (1.4) • Statements regarding when assessment tools will be administered, scored, and reported (1.5). (NOTE: Examples of assessment tools are required as evidence. Evidence requirements for this aspect of the training plan are detailed in section 4.) • Overall session length, number of sessions, and daily time length of sessions. (1.6)

Competency Unit: RABQSA-PT – Professional Trainers

Effective date: June 2009

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	<p>1.9 The training plan and the process for training are fully explained to the candidate, as shown in the trainee's workbook.</p>	<p>Provide documentation of the trainer's manual (1.1) and trainee's workbook. (1.9)</p> <p>Provide evidence that the training plan was confirmed with relevant personnel (the clients, management/supervisors, and/or trainees). (1.7) If applicable, include examples of any ongoing reporting of training status to relevant personnel. (1.8)</p>
<p>2. Prepare a lesson plan</p>	<p>2.1 Objectives of the lesson plan are identified and introduced.</p> <p>2.2 Lesson plans are developed based on the objectives of each training session.</p> <p>2.3 Lesson plans are recorded for each session of the training.</p> <p>2.4 Learner's prior knowledge of subject matter is considered in development of the lesson plans.</p> <p>2.5 Lesson plans are delivered in a manner consistent with known learning principles and theories using appropriate activities.</p>	<p>Provide a lesson plan (2.3) that includes the following information:</p> <ul style="list-style-type: none"> • Objectives of the lesson (2.1 and 2.2) and what the participants can expect to learn from the lesson (e.g., stated outcomes) (2.4) • A list of lesson plan activities and assessments that are <ul style="list-style-type: none"> ○ directly linked to the lesson plan objectives (2.2) and, ○ where appropriate, linked to prior lesson plans to establish a continuum of learning (2.4) • A list of materials required for effective delivery of the lesson plan (2.5).
<p>3. Understand the experiential learning cycle</p>	<p>3.1 The various models of the experiential learning cycles are understood and explained.</p> <p>3.2 The purpose of each step in the experiential learning cycle is identified.</p> <p>3.3 Basic training activities in the experiential learning cycle are identified.</p>	<p>Provide a lesson plan (2.3) that is designed according to an experiential learning cycle. The stages of the cycle must be identified (3.1), and appropriate training activities for each stage must be clearly defined (3.3). Provide supporting documentation that explains how each training activity was chosen (3.4) and how the activities accommodate various learning styles.</p>

Competency Unit: RABQSA-PT – Professional Trainers

Effective date: June 2009

Competency	Performance Criteria	Evidence Guide
	3.4 Methods to apply experiential learning in designing training modules are identified.	
4. Create and evaluate assessment tools	<p>4.1 When planning for an assessment tool, the following components are identified:</p> <ul style="list-style-type: none"> • The purpose of the assessment (summative or benchmark) • The target candidate group(s) (i.e., who should be given the assessment, requirements needed to take the assessment, when the assessment should be administered, etc.) • The competencies that will be assessed as shown in the training and/or lesson plan. • Where applicable, the competencies that will be assessed as linked to industry competency standards <p>4.2 The evidence required to demonstrate competency on the assessment is clearly defined and linked to the training plan (for summative assessments) and/or the lesson plan (for benchmark assessments).</p> <p>4.3 Instructions for both assessors and the assessed are provided related to the assessment administration, scoring, and use of the assessment results.</p> <p>4.4 The assessment tool is evaluated prior to use, and the evaluation includes specific criteria by which revisions/amendments may be made to the assessment tools (e.g., adjusting multiple choice items according to a pilot review, adjusting an essay scoring rubric to ensure consistent scoring, etc.)</p> <p>4.5 The draft of the assessment tool is evaluated to ensure the tool is valid, its results are reliable, and that it effectively measures the results of the training objectives. Included in the evaluation of the assessment tool is a process for collecting and recording feedback from the individuals involved in the evaluation.</p>	<p>Provide policies and procedures related to two different types of assessments used in conjunction with the training plan or individual lesson plans. The documentation provided for each assessment tool must contain the following:</p> <ul style="list-style-type: none"> • The purpose of the assessment (e.g., how it will be used as part of the training plan or lesson plan). (4.1) • Who is required to take or the stated requirements for taking the assessment tool. (4.1) • Instructions provided for the assessed, including information on how the assessment will be scored (including any rubrics or scoring expositions used to determine score), how the results will be used, which competencies are being assessed by the tool (as stated by standards or the training/lesson plan), how the assessed will receive their results, and how the results will be used by the assessor/trainer. (4.1, 4.2, 4.3) • Procedures used by the assessor to administer the assessment and/or score the assessment. (4.3) <p>Provide documentation that the assessment tools are evaluated prior to use or provide documentation as to how the assessment tools are evaluated after their administration. (4.5, 4.6) The documentation can include (but is not limited to)</p>

Competency Unit: RABQSA-PT – Professional Trainers

Effective date: June 2009

Competency	Performance Criteria	Evidence Guide
	<p>4.6 A process for making revisions to the assessment tools based on the evaluative feedback and feedback provided by individuals involved in the use of the assessment tools is documented.</p> <p>4.7 Policies and procedures for storage and retrieval, review and evaluation, and version control of the assessment tools are considered.</p> <p>4.8 Various assessment methods and the type of evidence they collect are known.</p> <p>4.9 Assessment methods are developed in a manner that ensures they are valid, reliable, and clearly defined.</p>	<p>collected feedback from the evaluation participants, a documented procedure on how assessments are modified according to these evaluations or based on post-administration reviews, policies or procedures related to version control of the assessments, documentation of the training provided to evaluators of the assessment, documentation showing how the assessment is linked to training, lesson plans or other competency standards, etc. (4.6, 4.7)</p> <p>If applicable, provide policies or procedures that guide the storage and retrieval of the assessment tools, the assessment results, when accommodations or modifications can be made to the assessment to allow access to the assessment, etc. (4.7)</p> <p>Provide description of methods used for collecting evidence and the procedure for ensuring that the methods are valid, reliable and clearly defined. (4.8,4.9)</p>
<p>5. Collect evidence to assess competency</p>	<p>5.1 Methods are used to determine participants' prior learning, physical and learning needs, and potential barriers to the participants' understanding of the material.</p> <p>5.2 Evidence is collected, organized and recorded using the assessment tools.</p> <p>5.3 Work activities or simulated work activities are considered as methods for collecting evidence to assess competency, and are discussed with relevant individuals within the organization</p> <p>5.4 The performance level required to pass the assessment (criterion-referenced assessments) or to receive a benchmark on the assessment (norm referenced assessments) should be based on</p>	<p>Provide one example of an assessment and/or survey given to identify the participants' prior learning (e.g., pre-tests), their physical and learning needs (e.g., pre-lesson surveys), and/or other relevant methods used to identify potential barriers to the participants' learning (5.1).</p> <p>Provide two assessment tools administered to candidates (preferably the same assessment tools referenced in section 4.) (5.2) Where applicable, provide the following related documentation:</p> <ul style="list-style-type: none"> • A completed scoring rubric as an example of the administered assessment if the assessment was performance-based

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Competency Unit: RABQSA-PT – Professional Trainers

Effective date: June 2009

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	<p>documented evidence of competence in the lesson plan objectives or according to industry standards (where applicable).</p>	<p>(where work activities or simulated work activities are evaluated). (5.3)</p> <ul style="list-style-type: none"> • Policies related to how the assessment evidence is collected, organized, and recorded. (5.2) <p>Provide documentation on how the pass criteria or benchmark criteria were developed. Examples of evidence might include procedures for setting a cut score, evidence that benchmark scores are related to industry performance standards (e.g., task analysis results), etc. (5.4)</p>
<p>6. Record and report the assessment decision</p>	<p>6.1 Assessment outcomes are recorded and reported according to policies and procedures and/or according to the organizational requirements (including any legal and ethical requirements).</p> <p>6.2 An assessment report is completed and shared with the candidate and any other parties requiring confirmation of the assessment. The reports include recommendations for follow-up action and the process available to re-assess. If no re-assessment is allowed, this fact is documented in the assessment administration materials.</p>	<p>Provide one example of an assessment report that is provided to candidates. (6.1) The report must be based on the assessment tool criteria used to make an assessment decision, and include follow-up actions the candidate may take as a result of their outcome (6.2) (e.g., re-assessment, identifying further evidence to be provided, confirming gap training needed, information regarding available appeal processes, suggested improvements in evidence gathering and presentation, etc.)</p>
<p>7. Evaluate the training process</p>	<p>7.1 Relevant individuals within the organization are consulted in evaluating the training process for continuous improvement.</p> <p>7.2 Relevant training system procedures and/or organisational/legal/ethical requirements are considered and followed in documenting the evaluation of the training process.</p> <p>7.3 Feedback is gathered and evaluated.</p>	<p>Provide one example of a feedback mechanism used to evaluate the effectiveness of the training (e.g., feedback surveys, lesson plan reflection sheets, trainer evaluation forms, etc.). (7.1)</p> <p>Provide one example of an assessment tool used to measure transfer of learning, or provide documented evidence that the transfer of learning</p>



Competency Unit: RABQSA-PT – Professional Trainers

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	7.4 Appropriate assessment tools are selected for measuring the transfer of learning.	<p>assessment was completed (in cases where a formal tool is not used). (7.4)</p> <p>For both examples, include documentation of the individuals who completed the feedback or assessment (7.1), any documented procedures for the delivery and evaluation of the feedback data. (7.2, 7.3)</p> <p>Where applicable, provide trainer-generated evaluations of training effectiveness, such as self-reflection journals, and documentation regarding changes to a training plan based on the feedback evaluations.</p>