

WORKPLACE TRAINERS: WHAT DO THEY DO?

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ABSTRACT

The role of the workplace trainer is growing in significance. This paper examines the role of workplace trainer as conceptualised in the recently released Training Package for Assessment and Workplace Training. Ways are explored of recasting this role in the light of a continuing research study and network learning theory.

Introduction

The organisation of learning in the workplace has taken on a new significance in the current policy climate. Many workers in a wide cross section of enterprises are increasingly being asked to take responsibility for facilitating the learning of their colleagues. Despite this shift there has been precious little research relating to the role of trainers, particularly the link with quality (Simons and Harris 1997, 6). This paper explores the role of the workplace trainer in enterprise settings and how this role might vary according to the nature of the learning and the work undertaken in enterprises. The first part of this paper explores the workplace as a learning environment and how it shapes the learning that takes place and hence the role of the workplace trainer. Current conceptions of the role (as embodied in the recently released Training Package for Assessment and Workplace Training) are contrasted with preliminary data collected in interviews with and observations of workplace trainers in three industries in three states. The final part of the paper then explores how the role of the workplace trainer might be recast in the light of learning network theory.

The workplace as a learning environment

The nature of learning that takes place in a workplace varies widely (Hager 1997, 9). Learning can be associated with formal training programs that may or may not result in some form of credential. As Candy and Matthews (1998, 14) note, this tends to be associated with the use of experts (trainers) who play a leading role in transferring the required knowledge and skills to the workers. The workplace is also a site for informal or incidental learning (Marsick and Watkins 1990, Hager 1997). Research evidence points to the value of both types of learning in the workplace and to the importance of achieving a productive balance between the two (Hager 1997, 9). It follows, therefore, that the role of the workplace trainer needs to take into account these different ways of structuring learning in the workplace.

Research has shown that while the workplace has distinctive advantages as a learning environment, there can also be drawbacks, particularly in small enterprises (Billett 1994, 1996; Harris, Willis, Simons and Underwood 1998). This is not to say that enterprises, and in particular small enterprises, do not value training. However, within the VET sector there has been a tendency either to see training and learning as synonymous (Field 1997) or to place a higher value on training which is structured and delivered (and therefore able to be controlled). Training of this type tends to lose its relevance, especially in the context of smaller enterprises. As Smith (1997) points out, this does not mean that smaller enterprises are less committed to learning. Rather, they rely on different types of learning from those promoted in VET policies and by VET providers.

In contrast with large enterprises, training in small and medium enterprises (SMEs) tends to be informal, enterprise-specific, undertaken on-the-job and related to day-to-day operations (Seagreaves and Osborne 1997, 47). Fundamentally, it is learning through work, where learning is integrated into doing the job. The learning environment provides a context where learning is embedded in or co-terminus with work (Scribner and Sachs 1990). This form of learning is distinctive because it:

- is task focused;
- occurs in a social context where status differences can exist between workers and there are often clear demarcation lines between groups of workers;
- often grows out of an experience such as a problem, crisis or novel event;
- occurs in an environment where people receive remuneration for their work; and
- entails different cognitive processes from those used in an off-site environment.

(Retallick 1993; Billett 1994, 1996a)

In small or micro business (which employs less than five persons) learning is very often facilitated on a one-to-one basis. The “training” is often unplanned, unscheduled, unrehearsed and spontaneous, often in response to a crisis or problem, and therefore often intuitive (Vallance 1997, 120). This training is characterised by the absence of dedicated training staff, and is often undertaken by the person(s) nearest the crisis who usually has little or no training expertise (Hawke 1998). Smith (1997) notes that learning often occurs in informal and “non-traditional” ways and is very dependent on time and the operating context in which the enterprise finds itself.

In many respects learning in the workplace is quite rigorously structured. It is framed by the features and structures of the work and the work practices in which the learning is embedded (Onstenk 1995). Customs, habits, attitudes, the way individuals respond to mistakes and problems, the degree to which questioning and time for explanations are tolerated – all these frame and shape how a person designated as “trainer” might approach the task of helping workers to learn their jobs.

The workplace trainer

As noted above, the learning environment and learning processes within an enterprise provide a powerful framework that shapes how a workplace trainer operates. Any understanding of the role of the workplace trainer needs to encompass both formal on-the-job learning as well as incidental and informal learning that takes place as part of the normal course of work.

Governments and large businesses have tended to believe that defining the role of the workplace trainer will be addressed by workplace trainer competency standards. These standards have received considerable official support (CSB-Workplace Trainers cited in Peak 1992). Critical research underpinning these standards, however, has been very limited (Garrick and McDonald 1992, 176).

These standards appear to be underpinned by a “skills deficit” notion of training which is more reminiscent of institutionalised approaches to skill formation (Garrick and McDonald 1992, 176-177). The standards also lack any real links with emerging ideas such as the learning organisation (Senge 1992; Bawden 1991) or the growing body of knowledge which emphasises learning embedded in daily work practices and occurring in an informal or incidental manner (Marsick 1987; Marsick and Watkins 1990; Harris et. al. 1998).

The recently released Training Package for Assessment and Workplace Training is interesting for its attempt to recognise that training does occur in a variety of settings, with particular attention being paid to training in small groups. A unit entitled “Train small groups” has been included in the revised standards. This unit appears to equate to the former Workplace Trainer Category 1 competencies (NAWTB 1999, 25).

This unit of competency is notable for a number of reasons:

- there is an overwhelming emphasis on *training* rather than *facilitating learning*;
- formalised training appears to be valued almost to the exclusion of informal and incidental learning;
- it seems to be based on the assumption that learning in the workplace proceeds in an ordered sequence involving diagnosis of training needs, setting objectives and provision of training. This may be more reflective of an off-site environment rather than the (often) problem-based and spontaneous nature of learning that occurs in the course of work;
- it bears remarkable similarities with another unit in the training package which focuses on the competencies required to deliver training sessions within a training program. It therefore raises questions about the *specific* competencies that a workplace trainer whose training role sits alongside their role as a worker may need to develop, compared with those competencies that

are relevant to a trainer working within a more structured training program where the major portion of their role is delivering training; and

- it does not make any links between the process of facilitating learning and how the work environment or work practices are part of the “resources” which the workplace trainer uses in the course of their work.

Further evidence of the scope and nature of the competencies developed by workplace trainers lies in data the present authors have been collecting recently for a study examining the role of the workplace trainer across a number of enterprises. In this study, observations and interviews were conducted with individuals who have responsibilities for facilitating the learning of colleagues. Three industries were targeted – information technology, real estate, and building and construction. Enterprises were chosen from SA, NSW and Victoria to include small, medium and large organisations.

The following table, currently being developed from detailed analysis of interview transcripts and observation reports, presents some components of the work of these workplace trainers. In the course of the interviews and observations, we saw evidence that does lend support to the description of the workplace trainer as embedded in the current standards. However, there was also significant evidence of ways of working that seemed reflective of approaches which placed learning and work alongside each other and where formalised approaches to learning co-existed with informal and incidental learning.

<p>Organises learning collaboratively with the trainee/learner</p> <ul style="list-style-type: none"> ➤ organises time, activities, resources to support learning ➤ negotiates tasks, goals for learning within the work activities to be completed ➤ links assessment and learning to work tasks or future learning opportunities
<p>Learns together with others</p> <ul style="list-style-type: none"> ➤ shares experiences (attending events such as training sessions, meetings, conferences, telling “war stories”, working with each other on a task, working alongside each other on related tasks, etc.)
<p>Promotes independence and self-direction in learners/trainees</p> <ul style="list-style-type: none"> ➤ organises (including selection of tasks that match learner/trainee’s level of skill, knowledge, experience, etc.) tasks which the learner/trainee tackles on their own ➤ encourages others in the workplace to be supportive of learning efforts of trainee/learner
<p>Advocates on behalf of learners/trainees</p> <ul style="list-style-type: none"> ➤ negotiates access to resources ➤ liaises with external training providers
<p>Reconciles experiences of work and learning</p> <ul style="list-style-type: none"> ➤ makes links between the requirements of a training program or immediate learning needs and modifies work or learning program to achieve a better fit
<p>Works alongside learner/trainee</p> <ul style="list-style-type: none"> ➤ draws the learner/trainee into the patterns of work ➤ connects work tasks with the learning goals, program ➤ fits facilitating learning into the stream of work commitments ➤ alters the pattern of work to make space, time for the learning process ➤ makes judgements about the balance between the learning needs of the trainee/learner and the need to deal with the immediate task ➤ monitors the work flow and quality of the learner /trainee as the job/task proceeds
<p>Draws on others in the workplace to help facilitate the learning process (this includes asking others in the workplace to work with the trainee/learner; bringing in other people to the learning discussions, etc.)</p>
<p>Discusses learning experiences with trainee/learner (these could be experiences shared in common</p>

or ones that the learner/trainee had experienced on their own. This can occur at a time apart from work, but also often occurs during the course of work. This discussion can relate to the task at hand or, if the work at hand is routine, to other topics of learning that are of interest to the learner/trainee)

- asks questions (to monitor progress, to check understanding, to encourage reflection and self evaluation, to draw the learner/trainee towards developing their own knowledge rather than “just telling them”)
- challenges ideas and thinking by telling “war stories”
- corrects mistakes in a positive, non-threatening manner
- extrapolates learning from current task into other situations and encourages trainee/learner to do likewise
- provides feedback (for reinforcement, correction, encouragement)

Assesses work and learning using both formal and informal processes

Demonstrates techniques, processes, etc.

Our data suggests that the role of the workplace trainer is shaped by the work of the particular enterprise. Within real estate enterprises, workplace trainers tended to be focused on an individual. Much of the learning is undertaken in a self-directed manner (that is, the learner works through a section of a module and then consults with other staff to monitor their progress etc.). This seems to mirror the individualised structure of work in the industry where each employee has a portfolio of properties that he/she manages fairly much independently from others. In contrast, learning within the IT industry is often team-based because work is organised around “projects”. Individual members of the group who have expert knowledge in an area share this with other members of the group, with the support and encouragement of a workplace trainer who often is also a team leader or supervisor. In some instances workplace trainers complemented the learning undertaken in these small groups with more formalised training programs such as an enterprise-wide mentoring program for newly appointed staff.

In the same way that the structure of work shaped the learning events, so too did the degree to which the learning program was formalised, sometimes by an external organisation. In the real estate industry, all of the workplace trainers were part of the traineeship program being managed by the Real Estate Institute. This external factor played a part in shaping the way the trainee tackled learning tasks and the manner in which the workplace trainer tackled their role. However, incidental and informal learning still played an important and integral role in the trainees’ learning.

Whilst there are similarities with the elements of competency articulated in the unit “Train small groups”, we would also contend that the above descriptions derived from observations of workplace trainers reveal the inter-relatedness of facilitating learning in the workplace and working. These two streams of activity are both important to capture because they are both integral to the work of the workplace trainer. We believe that these descriptions reveal that learning in the workplace is, in reality, a mixture of more structured approaches to facilitating learning and incidental and informal learning. In addition, the curricula, rather than being predicated primarily on defined competencies or identified training needs, is made up of the work of the enterprise. The work becomes the “developmental pathway” which the workplace trainer shapes and uses in the process of supporting the learning of staff. These observations, we believe, create the need to examine alternate theoretical frameworks to assist in reconceptualising the role of the workplace trainer.

An alternative framework for understanding the role of the workplace trainer

Learning network theory (Van der Krogt 1998) may provide a useful framework for us as we strive to understand this issue in the light of our research data on the role of the workplace trainer. This theory rests on the following key ideas:

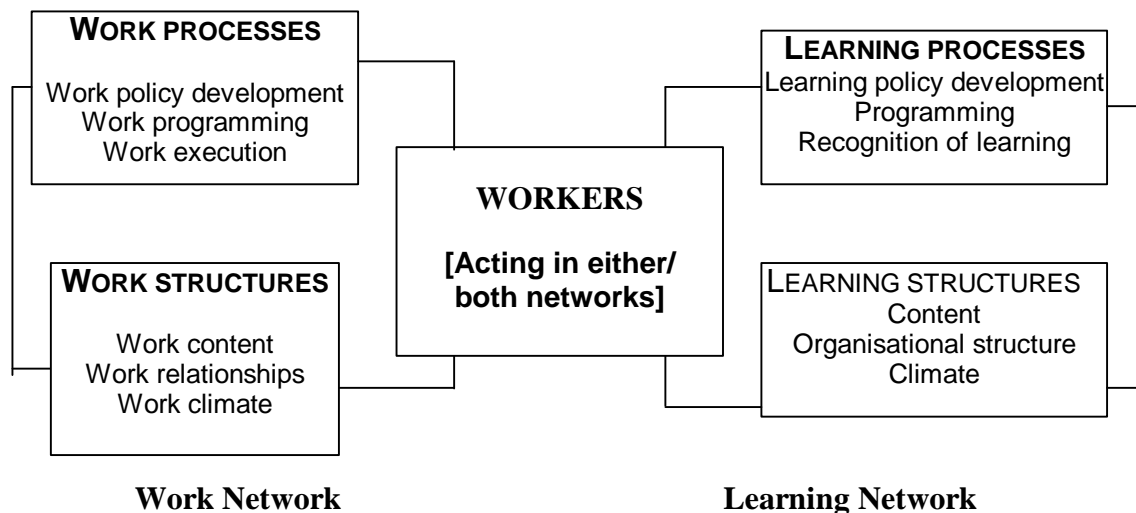
The concept of ‘network’ is understood in a particular way.

An organisation is made up of a series of networks. These networks (and therefore the organisation) are constantly being shaped by the actions of workers (‘actors’). Furthermore, the organisation itself is located in an environment that is part of a network.

In understanding workplace learning, two networks are of particular importance – the learning network and the work network.

Both of these networks are created and recreated over time. The actions of the workers and the structures within an organisation act on each other and shape the networks that emerge over time (see Figure 1).

Figure 1: The learning and work networks



[Source: Van der Krogt 1998:163]

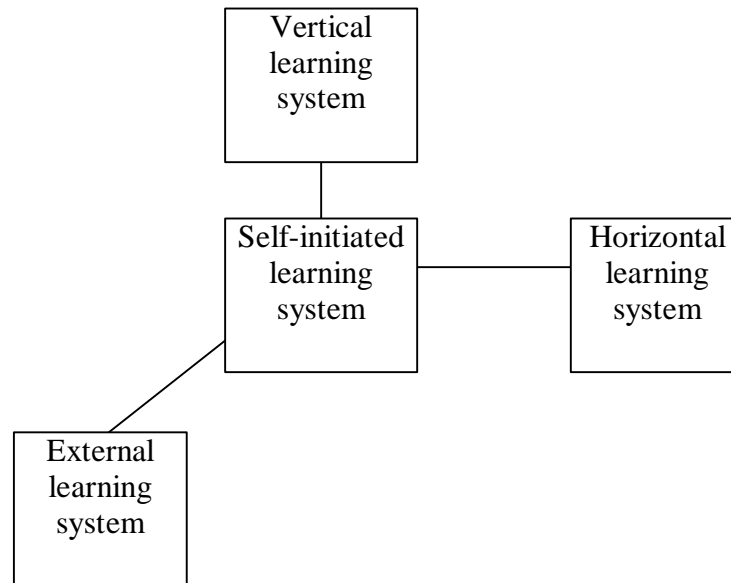
Different types of organisations are characterised by different learning and work networks

Within different types of enterprises, a certain form of work pattern is dominant. This work pattern is visible in the way work is undertaken and is constructed over time by the actors in the network.

In a similar way, key workers (actors) shape the structure of the learning processes (learning policy development, programming and qualifications) and create a learning network. It is important to note that Van der Krogt specifically states that the “learning structures” refer to both formal programs (offered internally and externally) *as well as* the informal and incidental learning which occurs in the course of work. By examining the nature of the learning that takes place in enterprises a number of different types of learning systems can be identified:

- Self-initiated learning systems allow the learner the freedom to organise their learning. Learners’ interests and needs are of paramount importance.
- Vertical learning systems encompasses learning that is underpinned by structural supports which exist inside the enterprise such as needs identification, training plans, use of trainers, human resource departments etc.
- Horizontal learning systems emphasise learning that occurs where people establish groups as a basis for implementing learning programs.
- External learning systems emphasise learning that is predominantly driven by external contacts such as professional associations, institutes, outside consultants or, in the case of many enterprises in Australia, the NVETS framework. They establish the content, processes etc. for the learning system which are then implemented within the enterprise.

A learning network then can be conceptualised as a three-dimensional space that consists of these learning systems (see Figure 2). The workplace trainer facilitates learning within this space along any number of these dimensions.

Figure 2: The learning network

[Source: Van der Krogt: 1998: 168]

Implications for workplace trainers

Within enterprises, learning and work networks develop a specific shape and relationship to one another. Networks are shaped and reshaped by the actions of individuals and groups within them. Rather than viewing workers /learners in an enterprise as passive recipients of training, their presence is highly influential. In concert with the actions of those designated to act in the role of workplace trainer, they work together to influence the shape of the learning that takes place as well as the shape of the work that is performed alongside this learning.

Network learning theory also acknowledges that learning in an enterprise is not solely activated, nor centred on, the activities of the workplace trainer. Individual workers can and do initiate their own learning. Network learning theory shows that it is possible to manage the tension between the needs of the learners and the needs of the workplace when designing and implementing learning systems. Designing and implementing learning systems in workplaces need to take account of *both* the learning capacities and needs of workers *and* the requirements of work.

Learning network theory provides added impetus for changing the focus of the activities of a workplace trainer from training to learning. This effectively shifts the locus of control to the individual and places the role of "trainer" in a position where they act to support and strengthen individual workers' learning activities in a number of ways.

People acting as workplace trainers are key players in the learning network. They also remain actors within the work network. The extent of their involvement in each of these networks is determined by the manner in which the work network is structured. Workplace trainers and their activities are shaped by the work network which is shaped, in turn, by the learning network. There is a synergistic relationship between the two networks and the workplace trainer is the "boundary rider" between the two systems.

The actions of a workplace trainer in supporting learning can encompass a number of key dimensions – in groups, with individuals, in formalised programs, and in incidental and informal ways. These actions to facilitate and place some structure on the learning process co-exist with individual workers' self-initiated learning actions in the workplace. An effective workplace trainer will have knowledge of how the learning network can be shaped by the actions of the workers in that network and how the learning network interacts and is shaped by the work network.

We believe that network learning theory provides a new way of conceptualising the role of the workplace trainer beyond that of an actor in a formalised, vertical learning system which, we contend, is the predominant focus of current workplace trainer competency standards. It values the actions of the workplace trainer in supporting incidental and informal learning within an enterprise and the

important contribution that these forms of learning can make to the overall development of a learning network within an enterprise. It acknowledges the interrelationship between learning and work. It offers a way of grasping (but not totally reconciling or ignoring) the tension between the learning needs, capacities and desires of individual workers and the need for work relevant learning.

It may well be that government attempts to promote a 'Training Culture' within enterprises cannot hope to succeed without clear recognition of and due consideration given to systems other than the vertical. To chat benignly about learning organisations being those where learning is co-terminus with (and by implication, "happily married" to) work, or to attempt to implement formal training using a top-down, skills deficit approach – either of these is only a part of the picture. In our view, the first lacks reality and is destined to remain in glossy managerial documents as an attractive philosophy with little hope of actual implementation. The second is somewhat 'colonial' and is appropriate only for certain types of organisational culture, comforting for systems that need to count numbers in formal training programs, at best short-term, and not feasible for small businesses which comprise a huge proportion of the Australian economy. From our perspective, then, the reconceptualisation of the role of workplace trainer" would appear to have much to offer those interested in promoting government policies to develop a "Learning Culture" within enterprises.

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