

Manual  
for  
Action-oriented and agile Learning  
in vocational education and training



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## Foreword to IO 7

How can in-company learning and development be designed to be action-oriented? How can it - instead of, for example, classical and theoretical lessons - directly practise competent action? How can these new competences be learned in such a way that they can be applied as directly as possible in everyday work? And how can learning activities also be conducted virtually, considering a new reality after Covid19?

These questions were the starting point of the project "HoWARP - Action-Oriented Continuing Education at the Workplace" (<https://agile-learning.eu/ho-warp/>), funded by the Erasmus+ programme of the European Union. In this project experts from Germany, Austria and the Netherlands worked together on developing agile and action-oriented learning concepts for organisations. This document contains the final intellectual output (IO7) of the project; a handbook for practitioners on how to develop action-oriented and agile learning activities within an organisation themselves. The handbook is primarily published as a moodle course, this document reflects the text of this course.

Accordingly in IO 7, a handbook is compiled that will prepare action-oriented/agile learning in the in-company continuing education in a practice-oriented manner so that:

- companies can work with it independently or purchase continuing education in a targeted manner,
- providers for further education are enabled to internationalize their offers and cross-border cooperate at the highest methodological level.

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## Unit 0 – Introduction

### 0.1: Orientation

This first unit, labelled Unit 0, as it is not part of the actual educational course, does not require any preconditions. Its purpose is to give you some overview over the entire course and to give you a first impression of the Complete Action and Agile Learning approach on which this course is built.

#### 0.1.1 Purpose of this Unit

You may use this unit for the following points:

- Give you some orientation over the entire course and each of its six units.
- Inform you about the content of each of the six units as individual steps of the complete learning path
- Introduce the different stakeholders and roles that are involved in the implementation
- Familiarize you with the didactical approaches of Complete Action and Agile Learning
- Introduce you to designing a learning process
- Make you aware of the possibilities and the consequences in working in an offline, a hybrid or a fully digital learning environment
- Enable you to select individual units and design your learning path or to apply the entire course to support you in your company's further education.

### 0.2 The handbook: how to use it and what it contains

Generally, the approach of Complete Action and Agile Learning works best if applied as an entire cycle, going through all six steps, as displayed in the six units of this handbook. At the same time the fundamentals on which this didactical approach is based allow a lot of flexibility in many ways. The fundamentals, as displayed below are the essence of the approach, whereas the full cycle of the six steps is an ideal form to guarantee the correct application of the essence. When applying the approach, you might be leaning more to one or the other side.

The format and set-up of the further education can vary as much as the content. It can be designed as on-site workshop for one or two days or as on online learning over the course of several weeks. It can be a mainly theoretical process, where you work with collecting, assessing and recombining information for creating new learning insights, or it can be a practical and hands-on experience where you immediately apply what you are currently learning.

Please note, that these differences in format and content do not affect the general approach of Complete Action and Agile Learning, being immediately work related and directly practice-oriented. There are many ways to apply Complete Action and Agile Learning, which is just one of its advantages.

In terms of how to use this handbook this indicates that you should first get an overview over all the six steps. The easiest and quickest way to do this is to Read the sub-chapters on the purpose and the intended results of each unit. After you fully understood the six steps and what they contain, you should be able to decide about how to set up your further education. Even if a clear differentiation between the six steps might sometimes not be possible and they might be blended with each other,

it is highly advisable to take care that the purpose of each step is reflected in the continuing learning process.

Agile learning means reacting to reality, tasks, people – and not doing as planned!

## 0.2.1 The structure of the units

Units 1 to 6 are all following the same internal structure for four distinct sub-units:

1. The first sub-unit is called **“Orientation”**. The required preconditions for successfully completing the unit are displayed. So, in case you decide to use only selected units of the entire cycle or merge units, you still must make sure that you still meet the preconditions for each unit. The purpose of this unit and the intended results show you why you should do this unit, and which results you will have achieved after completing it. Finally, you are introduced to the involved roles and stakeholders for each of the steps.
2. In the second sub-unit, called **“Input”**, you will get a detailed description of what this step consists of and how to implement it. The internal structure of these sub-units vary, according to their content.
3. In the third sub-unit **“General Resources and Background Information”** you are provided with additional information and resources. It contains links to the other so called **“Intellectual Outputs”** of the HoWARP-project, such as the **“Overview report”**, **“Case studies and best practices”**, a **“Methods manual for action oriented virtual training”**, a **“Competence-based framework curriculum for organisers of continuing education”** and **“Development of a course design”**. As all six units contain the links to the above-mentioned resources, you will also be provided with specific resources on the six steps in each of the individual units. – For this continuous text version of the handbook, the General Resources and Background Information are provided in a separate Chapter at the end of this document.
4. The fourth and final sub-unit contains a **“Checklist”**, which will allow you to verify if you completed all relevant tasks of this unit and gained all the suggested information and insights this unit provides for you.

## 0.2.2 Content of Units 1 - 6

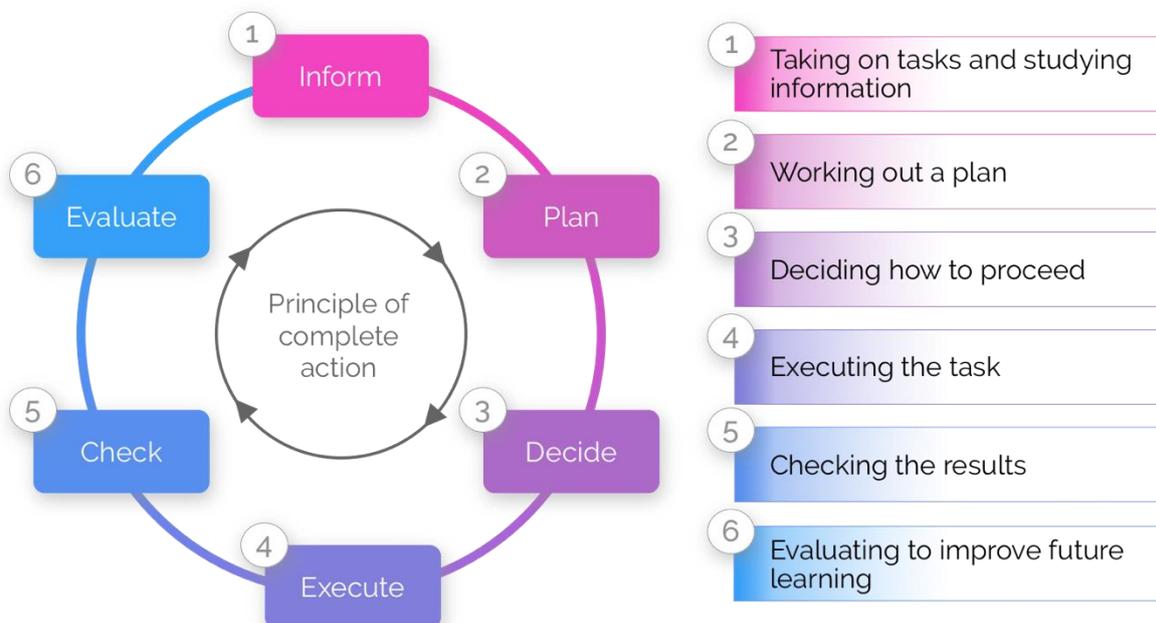
The following six Units of the handbook are structured according to the six steps of the Complete Action approach (see figure below). Here you will get a first overview what the six steps contain. The specific didactical approach of Complete Action and Agile Learning itself will be explained below.

1. **Unit 1 – Preparation / Information** will help you to identify and agree on the specific learning need and set the learning objectives. It will bring together all stakeholders and participants to define the learning context (duration, integration into workplace etc.) and to start gathering (background) information.
2. **Unit 2 – Planning: How can the learning activity be set up, prepared and designed** covers the planning of the learning activity, what will be done by whom and how it can be

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implemented. It is to make sure that a clear goal is set and that the necessary resources (time, space, personnel, expertise etc.) are available

- Unit 3 – Decision: Which solution should be chosen** is to verify as a team that the planned activities will provide sufficient opportunity to lead to the intended learning objectives and to determine whether it will be possible to carry out the planned learning activity considering the required conditions.
- Unit 4 – Implementation: Carrying out the relevant steps, individually or in a team** will provide you with the necessary information to execute the learning activity and how to identify and overcome obstacles the most likely will occur on your way.
- Unit 5 – Check** covers whether the learning goal has been achieved according to the originally identified needs or if additional learning activities have to be carried out in order to meet the learning goals – or perhaps also whether new learning needs have been identified.
- Unit 6 – Evaluation / Retrospective** is to help you to reflect about the cooperation of all stakeholders and participants during the learning process, about the learning process itself, what went well and what could be improved, and to better understand how the specific learning process helped you to solve the initial problem you had at work.



## 0.3 Basic didactical Principles of Complete Action and Agile Learning

Complete Action and Agile learning are complementary and overlapping approaches, which as a combined method work well together and are fostering each other. Following we will look at the key components of the combined didactical approach.

The principle of complete action rests on various theoretical approaches and focuses on the connection between learning and action. The focus is no longer on imparting knowledge alone, but also on applying knowledge in work-relevant tasks and in solving problems. In this way, in addition to ensuring subject relevance, a more sustainable anchoring of (subject) knowledge in the learners can be achieved. Another advantage of this approach is that other (knowledge) components of professional working behaviour, such as methodological knowledge or social cooperation, are also trained.<sup>i</sup>

### 0.3.1 Didactical principles of Complete Action

The approach of Complete Action is

- Demand driven, which means, that any kind of company does have a real problem to solve. The problem, the learning task and the developed solution are all immediately intertwined with the working situation within the company environment, which guarantees direct applicability.
- Application oriented, which means that at the end of the learning process is a result that can immediately implement. This element of the approach is testified in the fifth step "check" and put to a final test, when applied for solving the existing problem.
- Not following a curriculum, which means that provision of information and learning process follows reacting to reality, tasks, people. The learning process does not follow a fixed and established curriculum, but only explores and uses the information that are necessary at each individual step of the learning process – supported and accompanied by the didactical and the content expert.
- Self-directed learning, which means that learners and practitioners develop their own solution – supported by didactical and content experts. This element of the approach is not only open to completely new solutions (even those the content expert might not have thought about before), but also it is open to mistakes and learning by correcting them. Nevertheless, this element in reality often has its limitations (see: 0.3.3 Limitations of self-directed learning).

### 0.3.2 Didactical Principles of Agile Learning

Agile Learning approaches were developed, mainly at a high technical level, for more complex and demanding tasks. It is also based on the principles of action-oriented learning, essentially extending the full action principle by three elements.

1. All action steps (from notification to evaluation) are not necessarily performed only once for a task. The processing of a wide range of tasks from the operational context takes place in several cycles of complete actions and is checked and evaluated at the end. These repetitions are also called "stages" within Agile Learning.

2. This process uses the 'toolbox' of the Agile project management methodology 'Scrum'. This means, among other things, the use of a "backlog" approach to clearly present all necessary activities and a Kanban board to visualize the progress of work.
3. The business environment is an immediate element of the process. For example, a learning task is set by an internal client, and the outcome is also endorsed by this client. Also, the technical content is delivered not only by the trainers themselves (trainers, coaches, etc.), but also by experts from the same work environment. These contents might be part of the review or, for example, be covered in following cycles.

### 0.3.3 Limitations of self-directed learning

Especially the self-directed learning process will in many cases not be easy to implement 100%, for at least two reasons:

1. The required outcome of the learning process is already defined. This might be the correct application of a new tool or process step within an already existing production e.g.
2. The learners do not have the necessary background and experience for self-directed learning. In a working environment with mainly academically trained staff or experienced technicians' preconditions will be better than in a group of semi-skilled workers, e.g.

### 0.3.4 Complete Action and Agile Learning as an empirical approach

Two guiding principles make the combination of Complete Action and Agile Learning successful:

- **Flexibility:** Tasks always offer learners and practitioners freedom of choice, so there are several options to choose from. The principle of action-oriented learning implies that there are several viable ways to achieve task goals.
- **Quality:** If the result is unsatisfactory, the clear structure of the overall measurement makes it immediately clear which process step is faulty. Tracking these deficiencies allows us to explore difficulties in the learning process in greater depth.

As such, Complete Action and Agile Learning is an empirical approach, as it continuously checks back with reality in terms of learning experience and of applicability or the learning results. That includes that the method has no value "on its own" but rather in the processes it allows and amplifies.

## 0.4 Involved roles and stakeholder

This division of roles and stakeholders below is structured along the lines of ideal functionality, and not necessarily along what is found in all companies. Depending on size and composition of the company each listed role might be represented by an individual or one person might combine several functions in one. As an example, a (smaller) company might not have a separate HR-department, but still the function of overseeing staff's resources, qualifications and needs must be taken over. Equally, in a smaller handicraft business, the owner might be one of the practitioners, plus having a separate office, that also takes over HR-responsibilities. In this case the owner / practitioner will participate in the educational measure, carry final responsibility, and guarantee the business' commitment, while her or his office takes over HR-responsibilities as laid out below. Also,

in a bigger enterprise, the didactical expert or maybe even the content expert might come from the same company and depending on their qualifications might even be the same person.

## 0.4.1 Executive Manager and/or owner

The Executive Manager and/or owner has the ability to make the final decision about the education measure and to ultimately free the required resources. She/he thus carries the final responsibility for the further education within the company and has also the task of guaranteeing the company's strong commitment that is inevitable for the success of the measure. In this position, the executive manager's / owner is the client that has to define the goals and expectations. During the first step of preparing and informing she / he must be part of the process, as much as her / his ongoing commitment to the measure is critical for the team's motivation, especially at stage where changes and adaptations have to be made during the learning process. For this reason, her/his inclusion is again crucial in Unit 5 "Check" and Unit 6 "Evaluation".

## 0.4.2 HR

The role of HR is of crucial importance for the smooth progression of the educational measure, as it sits at a central position within the network of roles and stakeholders. HR liaises with managers / owners, practitioners and didactical / content experts. It is mainly responsible for the seamless integration of the learning process into the ongoing workflow and as such guarantees that the company's and the staff's resources are well aligned to allow a maximum outcome. Many examples have shown that the balance between freeing the required time for the learners and at the same taking into account the company's needs of the practitioners' workforce is an extremely sensitive point, not only for the success of the learning process, but also for the participants staying motivated by having enough resources for the learning and seeing their relevance for the company at the same time. This is especially true when the learning process is deeply integrated into the company's everyday work. In some bigger companies HR might also be responsible for assessing the staff's educational needs and for organizing further education. They might thus also initiate the further education and participate in the first step of preparing / informing and in the last two steps of check and evaluate. But the main task remains in providing a safe container for the learning process.

## 0.4.3 Employee/participant

The employee, who is the participant and learner of the further education, holds the key role in the entire process. She/he has the initial learning need and is of central importance for implementing all the steps of the learning process and she/he will also apply the newly acquired competences in her/his daily work. This implies that they must be prepared to accept the self-direction and the responsibility that comes with it. Their willingness is an important condition for the success of agile learning. In addition, learners must actively shape the learning process as a team, as they learn as individuals and as a team through one's own experiences. They must have a positive attitude and be willing to participate in the process, to discuss and to share their knowledge and experiences. Independent of hierarchical status within the company it is required that all members of the learning team are working on an eye-level.

## 0.4.4 Didactical Expert

The role of the didactical expert stands out in regard to the required expertise in facilitating the further education through all of its steps. Primarily being a communicator, she/he has difficult task to encourage the self-direction of the learners by guiding them in a perfect balance between allowing the learning process to happen and to correct and instruct the learners when they tend to go astray.

It is the didactical expert who needs to find a good proportion between the formal steps of the didactical method of Complete Action and Agile learning on the one hand and the application of the fundamental principles, geared to the target group and each individual situation. For the well-being of the learners. this sensitivity, the ability to assess a specific situation and to react accordingly is of utmost importance. For that she/he needs a deep understanding of the method.

But the competences the didactical expert must hold, go beyond these communicative abilities. She/he must also be able to liaise with HR about the required resources in learning-time am localities and must also be able to at least formulate the specified need for technical and digital support in case the learning is done at least partly in a virtual or blended environment.

## 0.4.5 Content expert

The content expert might be an external provider, she/he might come from the company itself or the learning group - supported by the didactical expert - might even be able to research the necessary information itself. As it is for the didactical expert, it is equally crucial for the content expert to find a right balance between a self-directed learning experience and guidance for the group. This also involves the flexibility of allowing the learning group to err and to learn from its mistakes.

Also, the provision of information for the learners can take many forms. The content expert might just oversee the research information the learners discover, she/he might present a portfolio with information or even produce information material, custom-made for the learning process or she/he might set up an entire digital platform – which should also provide better longevity and the opportunity to return to the educational resources at any time after the learning process. Any kind of information and knowledge provision and control is dependent on the specific set-up of the further education. In any case, the educational material should be usable in team and in individual work.

## Unit 1 – Preparation / Information

In Unit 0 you have been introduced to the cycle of complete action, with regard to developing – and executing – agile and action-oriented learning activities. In the current unit we will focus on the first step of the cycle: ‘preparation-information’. The objective of this step (unit) is to prepare participants for their learning activity. The focus will therefore be on identifying the learning need(s) and context.

### 1.1: Orientation

This sub-unit serves to guarantee that you meet the prerequisites to complete this unit successfully. Also, you will learn about the purpose of this unit, its intended results and the roles and stakeholders that are involved in this step of the Complete Action cycle.

#### 1.1.1 Preconditions

Before designing and executing the learning cycle these prerequisites must be met:

- A learning need (competence deficit) has been identified, both by possible participants as well as those who decide on and guide the learning process.
- Someone has or will take(n) control of the learning process (within the cycle of complete action); from (assisting in) identifying mentioned learning need/task(s), or confirming a learning need that someone else has identified, to deciding that some learning activity is justified and needed. This might be a ‘methodological facilitator’
- Participants have a professional or volunteer environment in which they (want to) organize and/or conduct the continuing education courses. This environment, e.g. the further education institution or the company in which it is to take place, or a funding body, supports the action-oriented approach or is at least open to it.

#### 1.1.2 Purpose of this Unit

You may use this unit for the following points:

- Identify and agree on/specify the learning need
- Decide on the learning objectives
- Select participants
- Have all stakeholders (including participants) acknowledge the learning need/task
- Search for (background) information on the learning objective
- Distribute/make available information on the learning task
- Define the context of the learning process; e.g. duration, cooperation with others, workplace learning,

#### 1.1.3 Intended results

After the completion of this unit

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- A learning need (working task) including learning goals has been defined
- Participants have been identified, there is a common agreement on their participation and the general course of learning activities according to the cycle of complete action
- Other roles (stakeholders) have been identified and assigned
- Participants have been informed on content (related information) on the learning task

## 1.1.4 Involved roles and stakeholders

- Executive Manager and/or Owner
  - Acknowledge/define learning need, set learning goals, identify/select participants
- HR-representative
  - Acknowledge/define learning need, set learning goals, identify/select participants
- Employee/participant
  - Acknowledge learning need, sets learning goals, searches for and gets acquainted with learning content (self-directed or provided)
- Didactical expert
  - Help to define learning need,
- Content expert
  - Search for and provides learning content

## 1.2: Input

For preparation / information, the first step of Complete Action, you need to understand who is articulating which learning need and who will be involved in fulfilling it. For this reason, we will take a closer look at which information are required and which questions to ask to have a good start into the learning process.

### 1.2.1. Setting the stage

After the first signs of a learning need have appeared preparations for designing agile and action-oriented learning activities can be started. A first step is to make an accurate assessment before the start of the project as to which resources are required if an action-oriented and agile learning project were to be implemented. This includes describing roles and responsibilities:

- Who acts as the client? The one who first raised the need for learning or others, if necessary?
- Who else needs to be involved? Who can provide necessary methodological and technical support, and content expertise – with regard to the learning process? Who facilitates an assists learning at the workplace? Is external support required and available?
- To what extent are role models needed, in which phase of agile learning?

In addition, it is important to make an initial estimate of the learning time or learning effort. It is difficult to make this estimate as long as the learning objective has not yet been further specified and the learning tasks have not yet been formulated. Agile learning is about experiential learning in a work context; depending on the learning topic, specially equipped learning rooms or a laboratory,

an appropriately equipped and accessible machine or similar might be necessary. A crucial question is finally, how quickly all these resources need to be made available.

## 1.2.2 Determining and describing the learning need

In order to prepare employees/participants on a learning activity/path both a clear description of the working/ learning task as well as clear definitions of the group of participants - including their working context – are necessary. These are closely intertwined off course, but in general some experienced learning need will start the process. To assist in defining and focusing this learning need, these questions can be asked:

1. Is there a necessity to learn?
  - a. What is the cause of the problem?
  - b. What are the consequences?
  - c. What does the ideal situation look like?
  - d. Is training (or any form of guided learning) the best and cheapest solution?
2. What has to be learned?
  - a. In what conditions/circumstances does the work/tasks have to be performed/executed?
  - b. How well does the work/task have to be performed/executed?
  - c. Which hindering and promoting factors play a role?
  - d. Where is the emphasis (lack of knowledge, psychomotor skills, and/or professional attitude)?
  - e. Is some form of assessment desirable?

Based on the above, the learning need can be described by means of

1. a description of the context in which the learning unit is located, and the questions that can be answered or solved with it. The lead question would be “What can this unit help you with?” Usually, two or three challenges would be formulated like "A need to coordinate the capacity planning of a project".
2. Two or three of the intended results, if possible formulated as competence objectives: “After working through this unit,...” e.g. the learner should be able to explain the method to others”

## 1.2.3 Determining (a group of) learning participants

Based on the learning need learning participants have to be identified, and a possible group of learners can be defined and described. Several stakeholders might be involved in this stage, but logically the ‘client’ – who might be the employee(s) him/herself - and the methodological facilitator contribute to determine the target group. The following questions can assist in the process of determining the group of participants:

- Who is required to contribute to accomplish the tasks for which competence building is required?
- Who has competence gaps and consequently learning needs?

To determine whether the target group and the individual employees are suitable for agile and action-oriented learning, the following questions are answered.

- Is the target group ready to/capable of learning? Does the target group have the right attitude and motivation, do they want to try out new things and learn?
- How much guidance/steering and support does the target group need?
- To what extent is the target group capable of directing/guiding their own learning process? Does the target group already have experience in planning and pursuing their own learning independently?
- Is there a focus on engaging in learning at the workplace, or to devote time to learning in parallel?

Even if the answers to some of these questions are limited, this does not have to be an obstacle. If, however, most of the target group has hardly any experience or opportunities to learn independently while working, and many see learning more as a threat than an opportunity, different kinds of learning should be considered.

### 1.2.4 Preparing learning participants

The starting point is a (learning) task from the current or future work context. This task must be fully grasped by the participants; both the task itself as well as its importance have to be 'incorporated'. It will usually involve familiarizing themselves with new subject content. If possible, learners should acquire this content themselves, using material provided by the content expert or material they have researched themselves. However, the content expert can also present the material in a lecture or similar, e.g. if there is not enough time for a phase of independent acquisition of learning material. The step of appropriation must then take place afterwards. This depends on the participants' ability in finding the material themselves and timely restrains. In this way, an intensive familiarization with this content is achieved.

The above means that participants have to be informed rather well in this stage of the learning cycle. The extent to which subject matter information is provided in this first step may differ. In some cases this might be quite extensive – such as a complete theoretical background -, in other cases it might be more or less the definition and acceptance of/agreement on a learning task for which no information is (yet) available. The coach or teacher provides this information or supports the learner in acquiring and getting acquainted with this information. There are several ways to do so, with main examples consisting of having participants search for content themselves or have the coach/teacher present this information to them. Sub-unit 1.3 contains links to resources that can be used in selecting an appropriate way of informing participants in this first step of the learning cycle.

## 1.3 Check-List

To check whether the step of preparing and informing has been carried sufficiently the following questions

- What actual learning need has been identified, what task(s) does this learning need involve?
- What content do the tasks involve?

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- Who acknowledges this learning need for themselves?
- Who will participate (group) in the learning unit?
- Who will/can be involved?
  - Executive Manager and/or owner
  - HR-representative
  - Employees/participants
  - Didactical expert
  - Content expert
- Do participants already perform these tasks, or are they able to?
- Is there another possibility for them to familiarize with (learn) the content on their own?
- What else must be provided regarding learning content, by whom?
- Is the work environment suited for agile and action-oriented learning? If not, can this be achieved or are there alternatives (e.g., Hybrid or virtual learning environments)

## Unit 2 – Planning: How can the learning activity be set up, prepared and designed?

In this Unit 2 “Planning” we will take a closer look at the steps that are necessary to plan the learning activity in your organisation. Please note that this is only about planning and not yet deciding or even implementing.

### 2.1: Orientation

This sub-unit serves to guarantee that you meet the prerequisites to complete this unit successfully. Also, you will learn about the purpose of this unit, its intended results and the roles and stakeholders that are involved in this step of the Complete action cycle.

#### 2.1.1 Preconditions

Ideally you should have gone through the previous Unit 1 “Preparation-Informing”. In any case you should be able to answer the following questions:

- What exactly is the learning need and which tasks are involved?
- What content does the task involve?
- Who needs to be involved from within your company/organisation?
- Who needs to be involved from outside the organisation?

If you have difficulties responding to these points or do not have a good understanding what they mean, it is advisable to return to Unit 1 “Preparation-Information” and then come back to Unit 2 and continue.

#### 2.1.2 Purpose of this Unit

You may use this unit for the following points:

- Plan what will be done – and by whom
- Plan which solution for your learning activity should be chosen and how it can be implemented
- Verify that you have a good plan on how to carry out the learning activity
- Reflect about your planning process

#### 2.1.3 Intended results

After the completion of this unit

- You have a clear understanding of the goals of your learning activity
- You can define each step of the learning process and the roles that are involved
- You are aware of the required resources in terms of personnel, educational materials, time and (external) educational experts (didactical and field-specific)

- You have a good understanding on how to free the required resources to integrate the learning activity into the ongoing work process

## 2.1.4 Involved roles and stakeholders:

- Executive Manager and/or owner
  - Aligns educational goal with company's strategies
  - Approves required resources
  - Aligns steps (and used methods) of the learning activity with ongoing work process
- HR-representative
  - Coordinates work force for learning activity and ongoing work process
  - Safeguards the employee's resources between learning activity and ongoing work process
- Employee/participant
  - Identifies and verifies the learning goal
  - Plans and oversees compatibility of learning activity and ongoing work process during all steps of training measures
- Didactical expert
  - Steers the learning process, knows which step to do next
  - Assures that goals and plans are realistic
  - Supports development of detailed and precise plan for learning activity
- Content expert
  - Identify necessary learning material

## 2.2: Input

In this step, the learners should independently consider and work out possibilities of how they want to approach and master the tasks. Experts are available to advise them and can give hints but should not direct the planning process. To enable the learner in doing so, the didactical and the content expert equally need to prepare learning material, time schedules and possible training sessions for the learning activity. When setting up this phase of planning several very relevant questions must be taken into account to allow for a good learning experience:

- Is the learning process design and its content well-adjusted toward the learning goal?
- Who is the target group, how is its qualifications and motivation and what are possible obstacles in cooperating?
- How is the learning and work culture within the company and the target group? Does it fit with the approach of Complete Action and Agile Learning?
- How many learning hours and how much effort is approx. needed?
- Are the required resources available, especially when it comes to time for the learning next to regular work?

## 2.2.1 Assessing learning objectives and didactical approach

Even if the initial need for a learning activity has been established, and this initial task has been clarified with all roles and stakeholders during the first stage, Unit 1 - Planning, this does not automatically imply that the learning objectives and the didactical approach on how to achieve them is already completed.

The skills and knowledge the learners need to acquire, will enable them to learn and work independently during the learning activity and back at their workplace. The competence-based and action-oriented learning approach will not only support them in successfully managing the learning activity but will also positively affect further problem-solving skills.

At this early stage, the content and didactical experts work closely together to identify the learning requirements: What knowledge and skills are needed to master which (sub-) tasks? What further knowledge - basic knowledge, cross-task knowledge - is required?

## 2.2.2 Elaborating the learning tasks

Elaborating suitable learning tasks, which in sum cover the learning topic, though it may be demanding, has a high influence on the success and the result of the agile learning project.

The didactical expert is of high relevance when it comes to this stage. What structure and didactic logic do the tasks follow? How can questions concerning learning and working attitude, for example, be mapped in learning tasks?

For self-directed learning, the expert should put a strong emphasize on materials which support the learners to independently elaborate new content. To facilitate learning that is as application-oriented, the self-learning materials should meet the following requirements:

- Well-structured to allow easy orientation and clear expectation setting for the results
- Working unit should be short and easily be finished within a previously defined lesson
- application-oriented, as the learning activity still aims to solve a practical case that occurred in a real work-life scenario

These requirements are broken down further to the following questions:

- What does this learning unit help with?
- What will the learners be able to do better afterwards?
- Is the presentation of the input compact and comprehensible?
- To which concrete task does the input apply?

## 2.2.3 How to set up the overall course

The organization of the agile learning activity must take several parameters into account. These are aspects like the size of the learner group and whether the planned learning measures matches the group size, or if it has to be split in several smaller learning groups, which makes the further task of aligning learners, experts, working schedules etc. even more complicated. Equally, the question of

when the new skills and competences should be available to the company matters for the planning and how much time and effort all participants are willing and able to invest. All this must be planned in good coordination with all sides and include generous buffers, as changes in schedules, regular workload or unavailability of relevant staff will always occur. Timely constraints at the workplace must not interfere with the time that learners need. Care must be taken that each working unit is at least long enough for the learners to acquire new, clearly describable competences each time. Otherwise, frustration or even failure of the learning activity are likely. This can partly be compensated by choosing different meeting formats that happen either on- or offline and give the participants more flexibility in getting together. In addition to spatial flexibility, learning formats that include asynchronous learning also give flexibility regarding time. If the learning task is provided in an online environment, the group can cooperate unrestricted of temporal and spatial limitations. But it should be kept in mind, that a) teamwork is always perceived as very beneficial and b) the more disconnected the team works, the simpler and clearer the tasks must be formulated.

## 2.2.4 Target group

In many cases, the target group will be predefined by the team that needs the learning activity. Whether participants can be selected or not, it is very helpful to understand more about them for a) the overall design of the learning measure and b) the formation of the learning tasks.

The following data will support tailoring the course to the participants needs:

- What are they mainly concerned with in their everyday work?
- What is their goal in the learning activity?
- What are the specific expectations for a given meeting?
- How much experience do they have in further learning?
- Are they familiar with the methods?
- How coherent is the group?

## 2.3 Check-List

- What is the goal of the learning activity?
- What are the detailed steps to implement the learning activity?
  - Who is executing which step, i.e. holds the responsibility for it?
  - Which resources are required?
  - Are the required resources available?
- When can it happen:
  - How long?
  - How often?
  - How to include the further education into ongoing work process?
- Where will it happen: on-site, online or hybrid?
- How will the training look like in detail?
- What will we have achieved after completion of the training?
- For all roles etc we need to include (internal: staff, time, space; internal or external: content & experts) do we know how to free the resources?
- Does everybody know their roles?

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- Can we come up with a plan that looks good to everybody?

## Unit 3 – Decision: Which solution should be chosen?

In this third unit we will look at deciding whether planned learning solution(s) can actually be carried out. In the previous units the learning need/task has been identified, and participants (employees) have planned a way (or possibilities) to carry out these planned learning activities. This includes, for example, a timeframe, necessary equipment/materials and working tasks or opportunities at the workplace to learn/practice. In this third unit, the decision will be made on whether this planning will be followed through, in dialogue with a coach/teacher or (e.g.) supervisor. It has to be remembered that the final decision on how the learning process will take place will primarily be made by the participants themselves, they will also bear the responsibility.

### 3.1: Orientation

This sub-unit serves to guarantee that you meet the prerequisites to complete this unit successfully. Also, you will learn about the purpose of this unit, its intended results and the roles and stakeholders that are involved in this step of the Complete Action cycle.

#### 3.1.1 Preconditions

In order to be able to decide on the learning path the following preconditions have to be met:

- A learning need/task has been identified
- Participants have been identified and informed, they agree on their participation and the learning objectives, and have freed the necessary resources
- Participants received or obtained additional information related to the learning process (such as theoretical content)
- Participants planned when and how they would like to learn the task within their/a working environment.

#### 3.1.2 Purpose of this Unit

You may use this unit for the following points:

- To determine whether the planned learning path will provide sufficient opportunity to lead to the intended learning objectives
- To determine whether it will be possible to carry out the planned learning activity considering the required conditions (time, resources/materials, interference with working conditions, etc.)
- To provide suggestions for adjustment of the planned learning activity

#### 3.1.3 Intended results

After the completion of this unit it will be clear whether the learning activities can be carried out according to plan, or if they will have to be adjusted.

## 3.1.4 Involved roles and stakeholders:

The involvement of stakeholders in this step ideally refers to some sort of dialogue (e.g. in a meeting) between all stakeholders, in which each of them reflects on the planned learning activity from his or her own professional perspective (see sub-unit 3.2).

- Executive Manager and/or owner
  - Reflects on planned learning activity from perspective of organizational feasibility (e.g. are planned learning activities at the workplace possible) and necessity
  - (co)decides on carrying out learning activity; as planned, minor adjustments during the learning activity, or major adjustments that lead to re-planning the learning activity (carrying out unit 2 again)
- HR-representative
  - Reflects on planned learning activity from perspective of human resources (target group of participants, learning needs/competence deficit, applicability planned learning activity)
  - (co)decides on carrying out learning activity; as planned, minor adjustments during the learning activity, or major adjustments that lead to re-planning the learning activity (carrying out unit 2 again)
- Employee/participant
  - Presents planned learning activities
  - Reflects on planned learning activity from combined perspectives of all stakeholders
  - (co)decides on carrying out learning activity; as planned, minor adjustments during the learning activity, or major adjustments that lead to re-planning the learning activity (carrying out unit 2 again)
- Didactical expert
  - Reflects on planned learning activity from didactical perspective
- Content expert
  - Reflects on planned learning activity from the perspective of content

## 3.2 Input

In the previous step participants have planned their own learning path/activity, in order to reach intended learning objectives. Within this planning, participants have, for example, described what additional information they will need to acquire, what working tasks or working opportunities they need in order to carry out learning tasks, and who they need to work/learn with. In addition, required materials and media, and a timeframe should have been described.

It has already been mentioned that participants are responsible for their own learning, and – as such – also for planning and executing this learning. Subsequently, the process of deciding whether the planned learning path can be carried out will usually not consist of a single decision made by a manager, but instead consist more or less of a dialogue between participants and all other stakeholders regarding different aspects of the feasibility of the plan. For example, participants present their learning plan to different stakeholders and other participants and receive feedback on

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(expected/required) opportunities to learn at the workplace, and on the expected 'time-to-competence'. In case of feedback proposing major changes to the plan, participants might then be able to revise – and possibly re-discuss it -, minor remarks can be processed while carrying out the learning activities.

Several questions can be asked when deciding on the planned learning path:

- Do the learning steps/activities match the learning objectives? (content, timeframe, etc)
- Which resources/materials are required, will these be possible to obtain and use?
- Is the workplace suited for the learning task?

## 3.3 Checklist

In order to check whether the third step within the process of designing and executing a learning unit has been completed you should be able to answer the following questions:

- Has everyone had the chance to present their point of view?
- Has a final decision on the learning unit been made?
- Do all stakeholders agree on the decision?

## Unit 4 – Implementation: Carrying out the relevant steps, individually or in a team

The implementation step is in the center of the Complete Action learning cycle. Informing, Planning and Deciding are preparing the actual implementation of the learning task. (The subsequent Check and Evaluation are later on taking a closer look at how the learning activity went, and whether it was successful.)

### 4.1: Orientation

This sub-unit serves to guarantee that you meet the prerequisites to complete this unit successfully. Also, you will learn about the purpose of this unit, its intended results and the roles and stakeholders that are involved in this step of the Complete Action cycle.

#### 4.1.1 Preconditions

Ideally you should have gone through the previous Unit 3 “Decision – Which solution should be chosen”. In any case you should be able to answer the following questions:

- Have you analyzed the data and understood the problem?
- Have you defined the goals of the learning activity?
- Are all steps and responsibilities for executing the learning activity clear?
- Has everybody involved understood their roles and tasks?
- Are the required resources in staff, material, and infra-structure available?
- Is everyone in the same boat and dedicated to executing the learning activity?

If you have difficulties responding to these points or do not have a good understanding what they mean, it is advisable to return to Unit 3 and then come back to Unit 4 and continue.

#### 4.1.2 Purpose of this Unit

You may use this unit for the following points:

- Execute the learning activity with the entire team
- Coordinate and monitor all tasks for reaching the educational goal
- Identify and overcome any obstacles that may occur during the learning activity

#### 4.1.3 Intended results

After the completion of this unit

- You will have implemented your learning plan
- You will have experienced whether you were able to implement it as planned or needed to adapt

- You will have achieved the competences you were aiming at with your learning activity
- You will be able to complete the task that initially led to the need for a learning activity

#### 4.1.4 Involved roles and stakeholders

- Executive Manager and/or owner
  - Oversees educational measures
- HR-representative
  - Safeguards and guarantees the availability of all staff resources
- Employee/participant
  - Actively engages in the learning process by implementing the content of the learning activity
- Didactical expert
  - Steers the learning process, knows which step to do next
  - Accompanies the learner if possible
- Content expert
  - Provides subject-specific input for the learning activity

## 4.2: Input

As much as this step of the Complete Action cycle is the central one, around which all this learning activity should be organized, it is at the same time the most open one in terms of format and content.

If we assume that this learning activity is e.g. primarily about finding a solution for a technical problem and as such mostly a learning process that is based on finding information, assessing it and designing a solution for a technical problem, then the implementation will mainly be a theoretical one. If we, alternatively, assume that the learning activity is a training about a new didactical approach (Agile Learning and Complete Action, e.g.) for workshops and includes a first trial version of this new didactical approach, then holding your own first workshop with this new approach would be the implementing step of your learning activity.

What exactly you will do in the implementation step, thus completely depends on the initial question you had for your learning activity and neither format nor content can be predicted or instructed. The approach of Complete Action and Agile Learning still holds some guiding principles for the implementing step that will be explained below.

#### 4.2.1 Demand-based and Action-oriented

Being demand based and action- or application-oriented is *the* basic criteria for the entire didactical approach and of course also reflected in the implementing step. This general criterion has already been reflected in the previous units on informing, planning and deciding and lead to the decision on how this implementation process was designed. But it cannot be overemphasized, that as the actual need for this training originated from a real-life work scenario, also the implementing step must be as close as possible to the original task. At the same time, it is a trial for future application, so in the

implementation you should already be doing what you think will be the real-life solution for the initial problem – at least at this stage of your learning journey.

#### **4.2.2 According to plan – with mistakes and failures being an inherent part of the process**

The previous units focused on gathering information about the initial problem, planning an educational measure and deciding on how it should be done. So, ideally everything for this implementing step should be set and done and you only need to execute it – ideally. And in fact, the plan you made based on your assessments and decisions should guide you through the learning process. But the emphasis here is on “should guide”, as it is only the *idea* of giving you *some direction*. Many obstacles and problems will come across your way, which will come from two directions. In this context theoretical or practical experience in workplace-like environments are advantageous compared to the immediate real-life implementations because learning and allowing mistakes to happen conflict with the requirements of any company.

Firstly, the workload might be too high in general or it might conflict with your regular work. This will affect the amount of time and effort you can invest in your learning activity. Secondly, it might turn out that the path you designed does not solve the problem – although you previously discussed it with your didactical and the content expert. In any case the occurring difficulties should be monitored and discussed with the didactical and the content expert to adjust the implementation step. The problems and how you solved them will be reflected in the following steps Unit 5 “Check” and Unit 6 “Evaluation”.

#### **4.2.3 Independently with didactical and content experts present, continuously or at agreed times**

A core element of Complete Action and Agile Learning is self-directed learning. This holds even more true when it comes to the implementing step of your learning activity. But it should also be kept in mind, that it is the responsibility of the didactical expert that learners do not get overwhelmed and frustrated. Especially learners without academic background can easily be challenged with a task and might need more attention from the didactical expert to step in when required. Particularly at this step the didactical and the content expert are working closely together, as the content expert will provide the required learning material and might also actively participate in the learning sessions to support learners with tailored information wherever necessary.

#### **4.2.4 Within a training space - but under conditions similar to the workplace**

When it comes to the environment in which the implementation step takes place, we can differentiate between three different possible scenarios. First scenario is a theoretical learning experience in which the implementing step of the task happens in an abstract form outside any workplace-like environment. This is for example the case when the handling of potentially dangerous chemicals and the prevention of accidents is discussed in a classroom. The second scenario is a workplace-like environment that allows practical experience, but without exposing the learner to the consequences a real-life scenario would have. For the case of industrial further learning, this could either be a training workshop or maybe even a VR-application. In learning areas

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that are focused on social interaction, a roleplay could be such a scenario. Finally, we have the implementation step in a real-life work scenario. Whereas the first scenario misses the closeness to reality, the latter one prohibits a real learning experience, as mistakes might have potentially severe consequences. Obviously, a workplace-like environment is most preferable.

## 4.3 Check-List

- Is your implementation demand driven?
- Is your implementation action oriented?
- Does your implementation allow for mistakes?
- Can you implement your learning activity independently and on your own?
- Do you have support that checks in or is available when needed?
- Do you have a scenario for your implementing step that is as workplace-like as possible but does not involve consequences in case of failure?

## Unit 5 – Check

The objective of Unit 5 is to check and assess the extent to which learning goals have been achieved. Evaluation of the learning process will take place in unit 6, this solely concerns the extent to which learning goals have been achieved and what possible gaps – in terms of knowledge and skills - remain.

### 5.1: Orientation

This sub-unit serves to guarantee that you meet the prerequisites to complete this unit successfully. Also, you will learn about the purpose of this unit, its intended results and the roles and stakeholders that are involved in this step of the Complete Action cycle.

#### 5.1.1 Preconditions

Ideally you should have gone through the previous Unit 4 “Implementation – Carrying out the relevant steps, individually or in a team”. Before going through this Unit 5 you should be able to answer the following questions:

- Have you implemented your learning plan?
- Have you experienced whether you were able to implement it as planned or needed to adapt?
- Have you been able to complete the task that initially led to the need for a learning activity?

#### 5.1.2 Purpose of this Unit

You may use this unit for the following points:

- To assess whether learning goals have been achieved, and whether these have met the originally identified learning needs
- To determine whether further learning activities have to be carried out in order to meet the learning goals (perhaps also whether new learning needs have been identified)?
- In some cases, to assess learning results/ a certain level of competence, to allow for some sort of certification.

#### 5.1.3 Intended results

After the completion of this unit

- it is clear whether intended learning results have been achieved.
- participants have checked for themselves whether their learning goals have been achieved,
- learning results can also be checked (assessed) by the didactical expert or, for example, a supervisor. In addition, possible gaps have been identified.

## 5.1.4 Involved roles and stakeholders:

- Executive Manager and/or owner
  - Reflect on outcome of learning activity from perspective of organisational feasibility (e.g. are learning activities at the workplace possible) and fit
  - (co)decide on carrying out learning activity; as planned, minor adjustments during the learning activity, or major adjustments that lead to re-planning the learning activity (carrying out unit 2 again)
- HR-representative
  - Assist Executive Manager and/or owner in the assessment
  - Employee/participant
  - Present planned learning activities
  - Reflect on planned learning activity from combined perspectives of all stakeholders
  - (co)decide on carrying out learning activity; as planned, minor adjustments during the learning activity, or major adjustments that lead to replanning the learning activity (carrying out unit 2 again)
- Didactical expert
  - Reflect on outcome of learning activity from didactical perspective
- Content expert
  - Reflect on outcome of learning activity from the perspective of content

## 5.2: Input

The results of fulfilling the learning tasks are first checked by the learners themselves: Does the result meet the requirements as well as their expectations? Have they achieved what the task required and, if so, to what extent? For this purpose, learners can use test sheets or a list of requirements for simpler tasks, if available. Afterwards, the coach or one of the experts could also give a professional assessment of the extent to which the learning objective has been achieved, where possible gaps or deficiencies remain and where there is a need for improvement. In the context of agile learning, this step is also called "review".

Questions to be asked when preparing the fifth step of agile/action-oriented learning at the workplace:

- What is the purpose of evaluating learning results; summative (e.g. certification) or formative evaluation (possible feedback for another cycle of learning?)
- How can be assessed whether learning goals have been achieved? What criteria can be used?
- Do we measure learning results and/or behavioural change at the workplace? (see Kirkpatrick in the video below)
- Is some form of certification included?
- What if learning goals have not been achieved, what is still missing? (formative)

## 5.2.1 Summative or formative assessment?

A test/assessment can have a formative and/or a summative function. In a test with a summative function, you decide whether a student has sufficiently acquired the learning objectives. A test with a formative function aims to provide the student (and teacher) with insight into his/her progress and to adjust further development.

The assessment of a summative test is usually in the form of a grade. In the event of a pass, the student will be awarded some form of acknowledgment - credits or certification/diploma. This assessment therefore has a certain consequence. A student can qualify for a study program or course or successfully complete a course/training.

Formative assessments give the student feedback on his/her progress and indicate what the student still needs to do (feed forward) to reach the final goal (feed up). In this way you as a teacher can adjust the learning process of the student. Essentially, every test with a summative function also has a formative function. After all, you want to provide the student with information about his/her development after taking a test.

How to test formatively? Many of the test formats that you can use to administer a test with a summative function can also be used for a test with a formative function: You can have students take a written practice exam. You can then give the results digitally or discuss them in class. Another possibility is to use Mentimeter during a lecture to stimulate discussion. You can also let the students discuss among themselves what the correct answers could be and only release them later and discuss them with them. An intermediate product, for example an assignment or a (first version of) a paper, can also serve as a formative test. Feedback on this product gives a student pointers on how they can improve the product. Feedback on a presentation or performance assessment is also a good formative assessment. Here too, the aim is to give the student instructions about his/her skills and progress.

## 5.2.2 Design principles for assessing competence

Five design principles for assessing someone's (professional) competence can be identified. Competence is assessed on the basis of what someone actually does; behavior.

- Assume a reflection of realistic task situations/contexts of a skilled professional.
- Involve different experts (fellow students, colleagues, supervisors, customers, teachers).
- Combine information from different testing moments (preferably over a longer period of time) and different testing methods. For example, narratives, qualitative input, self-assessments and expert judgments.
- Combine formative and summative assessment. An assessment is part of the learning process and there is no judgment without feedback.
- Set a clear standard and describe what you want to see as a minimum. If necessary, name scoring levels.

## 5.2.3 How to assess learning at the workplace?

One major question is how to assess learning outcomes? Five assessment methods have been identified that can be used to assess workplace learning:

*Observation in concrete work situations.* This way of assessing takes place in 'a natural authentic work context'. This is often also the context in which workplace learning itself takes place. For the assessment of competence it is important that the performance of tasks in that work situation can also be assessed in full complexity. A lot of time is therefore often needed to observe competence in this way and in its full breadth. That time is usually not there. The assessment is therefore often done on the basis of a sample of tasks. Usually, due to time constraints, this is also a non-representative sample of tasks. This is not preferable, but it cannot always be prevented. The observation should preferably be performed in full by someone who participates in the work context (for example, the manager) because of his or her familiarity with the authentic work context and any disturbances in the context compared to the normal situation.

*Retrospection/360 degree feedback/Self-reflection.* In retrospect, an assessor is asked to reflect on a person's actual behavior in a particular work situation. In principle, the scoring or assessment takes place on the basis of a standardized list of assessment points, linked to that behavior in that work situation. A well-known form of retrospection is that of 360-degree feedback. In addition, there are several raters who reflect from their own perspective on the actual behavior of someone else. A person's competence is thus examined from different sides. This form of assessment is mainly aimed at confronting a learner with his own behavior and its effects. For example, this assessment serves on the one hand to make someone aware of whether and to what extent someone is competent in the eyes of another. On the other hand, this assessment reveals strengths and weaknesses in a person's ability. Usually 360-degree feedback consists of a standardized questionnaire that helps assessors to judge whether and to what extent someone has the required competences on the basis of concrete behavioral indicators. Retrospection is a relatively simple method, in which the judgment of several assessors can be taken into account. The disadvantage of this method is that it mainly measures typical behavior, that the acceptance of the results can be problematic and that a lot of attention must be paid to the development of skills to give and receive feedback.

*Portfolio Review.* In portfolio assessment, appreciation and recognition of workplace learning follows from the assessment of a collection of evidence of one's abilities. These can be professional products, but they can also be completely different evidence for certain skills or competences. The portfolio assessment helps people monitor and evaluate their own work. Not only on quality or results, but also on substantive changes and the development of the work that goes with it. In a portfolio, someone can be given the freedom to determine and collect suitable evidence themselves, but it is also possible to determine in advance which evidence must be collected in order, for example, to achieve a certain formal recognition (a diploma or certificate). Portfolio assessment appears to work well when a portfolio can be used for different purposes. A portfolio could therefore work well if that portfolio is used for planning learning and development, as well as for supervising learners and assessing workplace learning. There must be clarity at an early stage about the form of the portfolio to be assessed for both the learners and the supervisors and/or assessors. Portfolio assessment is often combined with forms of retrospection and/or reflection, for example by means of criterion-oriented interviews or assessment interviews. In these conversations,

the student/candidate is challenged to reflect on his or her way of acting, the result thereof and the underlying thinking and decision models behind it.

*Work sample tests.* Work sample tests are individual 'performance assessments' on task behavior in work situations that are as authentic as possible. This includes, for example, the well-known 'assessment centers' or development centers. Work sample tests look closely at the performance of individuals to be assessed in realistic settings. These people perform realistic tasks, and they use all the tools that could be used in a real work situation. Because the course of task performance in a particular test situation cannot be completely predicted, performance is usually scored fairly roughly. At assessment centers and development centers, assessment exercises (simulations and work tasks) simulate situations that normally occur (regularly) in real life. These situations are usually simplifications of (complex) daily work situations. Assessments call on the available knowledge and skills needed to perform a task or to display certain desired 'task behaviour', and require interactions between people and that task behavior in and around the workplace. Competence is then determined on the basis of displayed task behavior in the most authentic possible work situation. The assessment of task behavior is sometimes also accompanied by a curriculum, which gives an indication of a person's strengths and weaknesses.

*Skills sample tests.* If a test in a realistic setting is not possible and therefore a work sample test is not an option, a so-called 'skills sample' test can offer a solution. This type of testing does not assess competence or task behavior in relation to a work situation as a whole, but only one or a few isolated skills. The skills sample tests are mainly used if it is necessary to assess whether someone acts competently in very unsafe situations. As is often the case in professions with high security risks, such as the fire service, police, defense or explosive ordnance disposal.

## 5.3 Check-List

The following questions can be asked to verify whether the step of checking learning results has been secured:

- What are the learning outcomes to be measured?
  - What new knowledge, skills and/or attitudes?
  - What change in work behaviour?
- Have assessment criteria been established?
- Who will measure the results?
- What methods and instruments will be used to measure results?
- How will results of the check be fed back to the learner?
- Formative or summative assessment, or both?

## Unit 6 – Evaluation / Retrospective

Unit 6 – Evaluation is the final unit of the six-step learning journey. The evaluation closes the circle of the Complete Action learning cycle. It allows a reflection on what has happened during the previous steps, but it also looks forward to future learning experiences and how to improve them. As such, this sixth step it is the connecting link between previous and upcoming further learning activities and guarantees constant improvement. To some degree the two terms evaluation and retrospective are used interchangeably, but during this unit we will narrow down the broader term “evaluation” to “retrospective”, as a retrospective, coming from Agile Management, is a more standardized way to conduct an evaluation.

### 6.1: Orientation

This sub-unit serves to guarantee that you meet the prerequisites to complete this unit successfully. Also, you will learn about the purpose of this unit, its intended results and the roles and stakeholders that are involved in this step of the Complete Action cycle.

#### 6.1.1 Preconditions

Ideally you should have gone through the previous Unit 5 “Check” and should be able to answer the following questions

- Have the learning goals (as identified in the initial planning stage) been achieved?
- Have they met the originally identified learning needs, i.e. have you applied the newly achieved knowledge in the original work scenario and did it help you solve your problem?
- Was the training sufficient or will further learning activities have to be carried out to meet the learning goals??

If you have difficulties responding to these points or do not have a good understanding what they mean, it is advisable to return to Unit 5 “Check” and then come back to Unit 6 and continue.

#### 6.1.2 Purpose of this Unit

You may use this unit for the following points:

- Reflect on the cooperation of all stakeholders involved in this educational process
- Reflect on your own learning process
- Identify what went well and what went wrong during the learning process
- Understand how the specific learning process helped you to solve the initial problem you had at work
- Formulate what should be continued and what should be changed in future trainings

## 6.1.3 Intended results

After the completion of this unit

- You will have a clear overview of what exactly happened during the education process in terms of the learning and team cooperation
- You will have learned which aspects of the learning activity supported the learning process the most
- You will have a better understanding of how the entire team experienced the measure
- You will understand what went well and should be kept and what needs improvement next time you carry out a learning activity

## 6.1.4 Involved roles and stakeholders:

Ideally in this step of the Complete Learning cycle all roles and stakeholders that have participated in the further education should take part to reflect on all aspects of the entire process. Compared to previous steps, where the different positions held different roles, now everybody comes together and shares their learnings and insights to improve for the future.

- Executive Manager and/or owner
  - Participate in evaluation
- HR-representative
  - Participate in evaluation
- Employee/participant
  - Participate in evaluation
- Didactical Expert
  - Facilitate the evaluation, as a separate workshop, an (online-) survey or oral feedback round at the end of the educational process
- Content expert
  - Participate in evaluation

## 6.2: Input

Periodically, but especially at the end of the learning phase, reviewing how the procedure went—and looking for ways to improve—is an essential part of any learning and working process:

- Was the information provided at each step sufficient?
- Was there sufficient and goal-oriented planning?
- Did the decision prove to be sustainable?
- What could have been done better in the implementation/execution?
- What could be done better next time?

At this stage of the learning process, the role of the didactical expert is more like a coach who guides the reflection process. They also provide their observations during the past learning phase and suggest strategies for future action. The role of the other team members, but especially the employees/learners should be to give active feedback and to share their personal experiences.

Retrospectives, as developed in Agile Management (and especially software development), are one way to do this, but it's important to understand that there is a difference between a structured retrospective or evaluation and "just talking about what happened". For this reason, you will now find a description of features of a good evaluation, respectively retrospective ('Retro').

## 6.2.1 Why do an evaluation?

Whereas Unit 5 "Check" is designed to check and assess whether the outcome of the educational measure actually meets the requirements to apply the newly acquired knowledge in the working context, the purpose of an evaluation is to have a closer look at how the learning process itself went. Unit 6 "Evaluation" reflects equally on the course of the further education as much as on achieving its claims of being closely work-related and supporting the performance of the employees individually and as a team. In other words, Unit 5 focuses on *if* the educational process met the goal of solving the initial problem at work, but Unit 6 focuses on *how* the educational process met this goal.

The reasons for an evaluation or retrospective are multifold. Generally, an evaluation helps to understand and appreciate the previous process but is equally relevant for future learning experiences.

Some of the main reasons are:

- To provide a platform to celebrate success and reflect upon failures.
- To enhance collaboration, communication, trust and team spirit,
- To strengthen the ability to identify how to improve the learning processes,
- To improve team productivity,
- To increase the 'lessons learned' within the team,
- To better anticipate future problems.

## 6.2.2 How to conduct an evaluation / Retro

A successful evaluation or retrospective requires a mindset that is open, honest, and constructive. It also requires people who are willing to learn from their mistakes and be flexible in their approach. This is because especially retrospectives are not just a team-building exercise but a way to identify and address problems that arise in the team.

Evaluations can be held in many ways. Surely the most efficient one with most results to harvest are those that are held as a separate meeting, like the Retrospective-format. It has the highest likeliness for active participation of team members, for active engagement, a multitude of methods, plus it can give the team a really good experience. For that reason, we will focus with the instructions on the Retrospective approach towards an evaluation. Of course, any of the exemplary questions can also be used for an online or offline questionnaire or a less structured open feedback round at the end of the workshop or learning experience.

Any kind of evaluation or retrospective should include the following points:

## 6.2.3 Set the stage

Setting the stage means preparing the meeting within a space that can either be physical or virtual or can simply consist of a web-space in which a questionnaire can be uploaded. It should be a place (on- or offline) where the participants can go to, feel welcome and get an overview over the course and the purpose of the evaluation or retrospective. Synchronous meetings require more preparation, especially when done virtually, but they also provide a higher likeliness of meeting the above listed reasons for having a retrospective. Of course, an evaluation can also be conducted as an online survey. Due to the limited interactivity and thus the absence of the opportunity to ask back and discuss, the results will be less fruitful.

## 6.2.4 Gather data and generate insights

To gather data you need to prepare the questions covering the area you want to evaluate. Another option is to choose formats where the participants come up with topics that are most relevant to them. In the list below with online resources for retrospectives contain several digital formats for doing so. The following discussion about the data you gathered will help you generate the insights you need for further improvement of the further education. Often the discussion develops naturally out of the data collection.

This is an exemplary list of questions that can be either used for a questionnaire or as an inspiration for a synchronous meeting:

- How much were the learning activities in this workshop/training related to your daily work?
- How much were you able to decide for yourself what you wanted to learn?
- Did you find the learning activities in this training/workshop short and to the point?
- Did you continuously reflect about what you were learning during the learning activities?
- How was team cohesion, cooperation and mutual support and how could be experienced?
- After the course, will you use new methods in your daily work?
- To what extent did the workshop improve your agile and action-oriented work skills?
- How much did you experience the advantages of agile methods in further education?

## 6.2.5 Decide

A classical exercise for this step of a retrospective is “Keep – Drop – start”, where the team decides about which elements of the learning journey will be kept, which will be abandoned and which should be newly included next time. A similar exercise with an equally catchy name is “The 4Ls: Liked – Learned – Lacked – Longed for”. It is a crucial component of this step that decisions are made together and not in a top-down-approach. Again, you will find several variations for these exercises in the ‘additional resources’ section below.

## 6.2.6 Close the Retro

As for Set the Stage, the closing of the retro again has strong effect on team cohesion and the motivational involvement of all team members. At this last stage of the Retrospective, the participants should be given the opportunity to give feedback on the Retrospective itself. This can be on its efficiency, how honest they were, how much they think the most relevant points were touched upon. In brief, it is a retrospective of the retrospective – as it should also be improved next time you do it.

## 6.3 Additional Resources

### 6.3.1 Additional resources on evaluations in general:

- [Training Evaluation Models: The Complete Guide](#)
- [Lernorientierte Qualität in der Weiterbildung: Evaluationsmethoden](#)
- [The Learning-Transfer Evaluation Model: Sending Messages to Enable Learning Effectiveness](#)
- [Kirkpatrick's four levels of training evaluation \(English\)](#)
- [Kirkpatrick's four levels of training evaluation \(German\)](#)

### 6.3.2 Additional resources on how to conduct a Retrospective

- [Retromat – Planning your next agile Retrospective](#)
- [Retromat – Preparing your first Retrospective](#)
- [Retromat – Preparing your first \*remote\* Retrospective](#)
- [Introduction to the Agile Retrospective – the Why, the What and the How](#)
- [The Complete Guide to Run a Remote Retrospective](#)

## 6.4: Check-List

- Did you conduct your Evaluation / Retrospective?
- Was everybody present who participated in the learning process?
- Was everybody involved in sharing information?
- Did you choose a format that was adequate?
- Did you gather information on:
  - The learning experience?
  - The team cohesion?
  - The adequacy of the learning design?
  - The work relevance of the learning outcome?
  - The learners' satisfaction with the learning activity?
- Were you able to generate new insights?
- Was everybody involved in generating these insights?
- Did you come to conclusions on how to keep or change things for the next course?
- Did the team celebrate its success?
- Were you able to talk about individual and collective mistakes?

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- Did you have an open, honest and constructive mindset?
- Did you have a closing of the evaluation/retrospective that gave everybody a good feeling?

Congratulations! You have finished the cycle of Complete Action!

## 7 General Resources and Background Information

- [HoWARP project webpage](#)
  - <https://agile-learning.eu/en/projekte/howarp>
- [Overview report \(PDF,EN\)](#)
  - <https://agile-learning.eu/en/projekte/howarp/io1/io1.pdf>
- [Case studies and best practices \(PDF,EN\)](#)
  - <https://agile-learning.eu/en/projekte/howarp/io2/io2.pdf>
- [Methodenhandbuch für handlungsorientierte virtuelle Weiterbildung \(PDF, DE\)](#)
  - [https://agile-learning.eu/en/projekte/howarp/io3/io3\\_de.pdf](https://agile-learning.eu/en/projekte/howarp/io3/io3_de.pdf)
- [Das Methodenhandbuch als interaktive Webseite](#)
  - <https://info.agile-learning.eu/de/methodenhandbuch/methodensammlung>
- [Methods manual for action-oriented virtual training \(PDF, EN\)](#)
  - [https://agile-learning.eu/en/projekte/howarp/io3/io3\\_en.pdf](https://agile-learning.eu/en/projekte/howarp/io3/io3_en.pdf)
- [The methods manual as interactive website](#)
  - <https://info.agile-learning.eu/en/methodenhandbuch/methodensammlung>
- [Methodes Handleiding voor actiegericht virtuele opleiding \(PDF, NL\)](#)
  - [https://agile-learning.eu/en/projekte/howarp/io3/io3\\_nl.pdf](https://agile-learning.eu/en/projekte/howarp/io3/io3_nl.pdf)
- [Kompetenzbasiertes Rahmen-Curriculum für OrganisatorInnen von Weiterbildung \(PDF, DE\)](#)
  - [https://agile-learning.eu/en/projekte/howarp/io4/io4\\_de.pdf](https://agile-learning.eu/en/projekte/howarp/io4/io4_de.pdf)
- [Competence-based framework curriculum for organisers of continuing education \(PDF,EN\)](#)

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- [https://agile-learning.eu/en/projekte/howarp/io4/io4\\_en.pdf](https://agile-learning.eu/en/projekte/howarp/io4/io4_en.pdf)
- [Op competenties gebaseerd curriculumraamwerk voor organisatoren van post-initiële schooling \(PDF,NL\)](#)
  - [https://agile-learning.eu/en/projekte/howarp/io4/io4\\_nl.pdf](https://agile-learning.eu/en/projekte/howarp/io4/io4_nl.pdf)
- [Information über Agiles Lernen als interaktive Webseite](#)
  - <https://info.agile-learning.eu/de>
- [Information about Agile Learning as an interactive website](#)
  - <https://info.agile-learning.eu/en>
- [Informatie over Agile Learning als interactieve website](#)
  - <https://info.agile-learning.eu/nl>

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