THINK PIECE NO 5: DELIVERY OF ADVOCACY TRAINING

CONTEXT

Background

1. In FY2013-14 the Department of Veterans’ Affairs commissioned the latest of a series of reviews of Advocacy Training. The relevant issues from the recent reviews follow.

2. Rolfe Review. The Review found that, to assure competent practice, practitioner training should incorporate:
   a. adult learning principles;
   b. clear training goals;
   c. a clear training and development path from novice to senior practitioner; and
   a. on-the-job training (OJT) and mentoring by ESOs.

3. Bull and Bear Report. The Bull and Bear Report includes the following findings on current TIP training:
   a. outcomes are badly written;
   b. training is very didactic and content focused;
   c. adult learning theory should be applied to engage ‘learners’;
   d. participants should be taught how to access information so they can find the information they need when they need it;
   e. OJT needs to be formalised as an extension of TIP face-to-face training; and
   f. evaluation is ineffective (the essentials are not addressed and "testing" gaps exist).

TIP NSW-ACT Response

4. In November 2014 the NSW-ACT Training Consultative Group authorised release of TIP NSW-ACT Policy and Procedure No 1, Training Policy and Framework. The new policy requires TIP NSW-ACT from 1 January 2016 to transition to adult learning and to implement a clear training (viz, learning) pathway grounded in clear, identified training (viz. learning) outcomes.
5. During the early part of CY2015 the Compensation and Welfare streams have begun preparations for the new delivery method. Their focus is the integration of e-learning into the learning pathway and transitioning course delivery from didactic teaching to facilitation of learning. The thrust of, and some learning elements from, the welfare and compensation streams are applicable to the Death Compensation (War/Defence Widow(er)) Course.

Scope of Paper

6. This ‘think piece’:
   a. responds to key findings from the ‘Rolfe Review’ and Bull and Bear Advocacy Training Report:
   b. builds on TIP NSW-ACT Policy and Procedure No 1,
   c. is the product of:
      (i) Welfare stream experience in February 2015 with delivery of the new ‘cradle-to-grave’ training framework; and
      (ii) Compensation stream experience in 2014 delivering the Tri-Legislation Course Level 1, and a workshop in February 2015 of the Level 2.

7. Although written as a ‘think piece’, the learning pathway and process in this document are being trialed by TIP NSW-ACT so that their implementation can be considered by the Committee of TIP Chairs for adoption – amended as appropriate – as TIP National policy.

Aim

8. The aim of the paper is to identify and integrate the key considerations on which the transformation of the NSW-ACT Training and Information Program is being grounded. The considerations below are subject to continuous improvement following implementation from 1 January 2016.

Assumptions

9. This paper assumes that the DVA-ESO-TIP partnership adopts a systems approach to the enhancement of practitioner competence. In other words, the partners will:
   a. reach agreement on individual and shared responsibilities,
   b. allocate the necessary resources,
   c. implement an agreed transition plan,
   d. monitor progress and adapt the plan as required,
   e. communicate in a timely and effective manner, and
   f. establish and respond actively within a performance-feedback framework.
CONCEPTS

What is Adult-Learning?

10. Current TIP Delivery. TIP has traditionally used didactic teaching. This delivery method relies on lecturing to impart knowledge, questioning to test ‘knowing’, and exercises to illustrate how knowledge is relevant to the ESO environment. TIP courses aim to return participants to their ESO ‘knowing’ core content, and are conducted in the expectation that ESOs are providing OJT and mentoring to develop their trainee practitioners’ ability to apply knowledge. The evidence is that few ESOs are providing OJT-mentoring.

11. Future TIP Delivery. Adult learning is best considered the diametric opposite of didactic teaching. The ‘telling’ involved in didactic teaching is inappropriate to adult learners, who are stimulated by collaborative problem-based learning. Rather than the teacher lecturing and testing knowledge, the adult-learning ‘facilitator’:
   a. builds on learners’ life-experience,
   b. regards learners as equals in exploration, and
   c. emphasises:
      (i) ‘understanding’ of core content, and
      (ii) where to find information.

12. Principles of Adult Learning. Knowles, an authority on adult learning, has identified six principles of adult learning. Knowles’ principles are first applied during the e-learning and pre-course phases, but the face-to-face phase is the TIP Presenter’s opportunity to reinforce their relevance by the way in which this phase is delivered:
   a. **Motivation and Self-direction.** Adult learners resist learning when they feel information, ideas or actions are being imposed on them. Consequently, as an adult-learning facilitator, the TIP Presenter will encourage participants to be responsible for their own learning (self-directed) and will foster their internal motivation to learn.
   b. **Life Experiences and Knowledge.** Adults like to use, and learn best if they use, their knowledge gained from life experience and apply it to their new learning. As case studies are rolled out in the face-to-face phase, the TIP facilitator will encourage participants to reflect on their life experiences, and then allow them to clarify their understandings of the new information by proposing solutions to problems or asking questions with a view to receiving feedback.

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1 This section has been abstracted and then amended from the Queensland Occupational Therapy Fieldwork Cooperative website; see:

2 Didactic teaching is the traditional classroom training method. It is teacher-centred, seeks to transfer facts, relies on the teacher’s authority and the teacher’s telling students what they need to know, and has right and wrong answers. Students are largely passive listeners, accepting the teacher as the knowing expert.
c. **Goal orientated.** Adult learners learn best when they understand the TIP core content so that they can apply it to the real-life issues their ESO clients will bring to them. The TIP learning facilitator will therefore nurture the learner’s capacity to problem-solve by developing their awareness of the underlying need for the knowledge or skill.

d. **Relevancy orientated.** Adult learners need to know the relevance of legislation and policy, and where to find the information relevant to their eventual role as an ESO practitioner. As a learning facilitator the TIP Presenter will therefore help the course participant to:

(i) integrate knowledge, information and experience;
(ii) identify what is important when working with clients; and
(iii) learn how to prioritise their client’s needs.

e. **Practical Orientation.** Participants will transition most easily from TIP course attendance, better absorb ESO OJT and mentoring, and progress to independent problem-solving most quickly when they recognise themselves how what they are learning applies to being a practitioner. The TIP facilitator will therefore use face-to-face case studies to help participants ‘practice’ being a practitioner-in-learning, allowing them to experiment with their understandings and tutoring3 them on their thinking to consolidate their learning.

g. **Respect.** Most critically, adults need to feel that they are respected. Any sense of disrespect, of being under-valued or of not being recognised as an individual will prompt hostility - an instant barrier to learning. As adult learning facilitators, TIP Presenters will therefore reinforce participants’ need for respect by responding to their individuality (see learning styles below), listening carefully to what they say, tutoring to increase their depth and breadth of understanding, helping them to learn how to reflect more deeply, and only interrupting (to maintain focus) when enough has been said that it is unambiguously clear that the issue being raised is ‘off the track’.

13. **Individual’s Learning Styles.** Whereas TIP’s traditional teaching method has taught all students in the same way, adult learning recognises that learners have different ways of learning. Four styles of learning that the TIP Presenter will most probably encounter and must be able to respond to are:

a. **Active learners.** People with this learning style like to be challenged. They think well on their feet and enjoy being thrown in the deep end, learning best ‘on-the-job’ through practical experience and experimentation.

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3 Tutoring involves providing relevant feedback, reinforcing correct understandings and consolidating knowledge, correcting inaccurate/incomplete/incorrect understandings, and reiterating core content when summarising the case study solution.
b. **Reflective learners.** Learners with this learning style need time to plan, prepare, research and to have time to reflect on their learning before being confronted with a new challenge. They may like to be thoroughly briefed before proceeding.

c. **Theoretical learners.** Theoretical learners are stimulated by abstract ideas. They like to consider a variety of viewpoints and analyse a situation before choosing their approach to a task. They learn by observing, discussing and analysing, and enjoy logical and complex reasoning.

d. **Pragmatic learners.** People with this learning style enjoy learning from demonstration, need to understand the practical use of what they are learning, and need to know that what they are doing works and is realistic.

14. With this background in mind, this paper now moves on to practical application. How TIP NSW-ACT is progressing the transition to adult learning and an appropriate learning pathway follows.

**IMPLEMENTATION**

**TIP NSW-ACT Training Framework**

15. Ratified Framework. In December 2014 the NSW-ACT TCG ratified the following training framework, which depicts the elements and sequence of activities delivered by TIP NSW-ACT that a participant must complete to progress from novice, at the top, to skilled and knowledgeable compensation and welfare practitioners working as a team within their ESO at the bottom.

16. Explanation. In more detail, the diagram shows:

   a. through the centre of the diagram:

      (i) the main activities for each training stream between Levels 1 and 3 for the compensation streams (warlike/non-warlike, and war/defence widow(er)s) and welfare Levels 1 and 2; and

      (ii) the activities in the training pathway that are the responsibility of ESOs, including the point at which authorisation as a practitioner and access to VITA indemnification insurance will be possible.

   b. at the peripheries: the pre-requisites to attendance at a TIP face-to-face course.

17. Continuous Learning. The framework is based on a continual learning process. Each face-to-face course is preceded by mandatory e-learning and followed by mandatory OJT-mentoring and self-directed e-learning. Reflecting adult-learning principles:

   a. **E-Learning.** Completion of the required e-learning courses will ensure that participants have an appropriate level of understanding of the knowledge base
applicable to the level of training before attempting the mandatory pre-course questionnaire.

a. **Pre-course Questionnaire.** Satisfactory completion of the mandatory pre-course questionnaire will demonstrate that participants have an appropriate level of understanding of the knowledge base applicable to that level of training before attending the relevant face-to-face course.

b. **Face-to-face Course.** Face-to-face courses will consolidating understandings and apply knowledge through case study analysis, discussion and tutoring. TIP NSW-ACT’s objective is to ‘kick start’ participants’ development of a basic level of competency before they return to their parent ESO.

c. **ESO OJT-Mentoring.** As TIP course participants will return with only a basic, entry-level of competence, their ESO they will need to be provided OJT and mentoring by an experienced practitioner. Ideally, this development support will be provided face-to-face; however, when that is not possible, ESOs will need to connect their trainee practitioners with an experienced practitioner in an adjoining ESO or through a Pension and Welfare Officers Network, or through a Veterans’ Centre, or by electronic means with a more distant practitioner.

18. **Intended Consequences.** Two consequences are intended for parent ESOs from the TIP NSW-ACT’s transition to adult-learning and a clear learning pathway:

a. The immediate consequence is ensuring ESOs receive from TIP face-to-face courses a trainee-practitioner with entry-level competence ready to engage effectively in OJT-mentoring. The intention is to lighten the OJT and mentoring load and provide time to train senior practitioners as mentors.

b. The intended longer-term consequence is expediting and substantially increasing the competence of all practitioners by establishing rigorous training milestones and engendering a culture of continuous improvement.

**Training Outcomes Framework**

19. **Compensation Stream Outcomes.** To flesh out its stream within the training framework, the Compensation Team has defined the training outcomes for each of the training activities engaged during the Tri-Legislation Course Levels 1 and 2. Together the learning activities and learning levels constitute a learning pathway. The elements and related outcomes are identified in the diagram following overleaf.\(^4\)

20. **Explanation.** In more detail, the diagram shows:

a. the three levels of learning activity at each level of learning up to and including authorisation by the parent ESO as a practitioner:

   (i) self-directed and ESO-directed pre-course preparation in the left hand column,

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\(^4\) In due course, companion diagrams will be included for the Welfare Levels 1 and 2 courses, and the Death Compensation (War/ Defence Widow(er)s) Course.
Level 1 Sequence:
- Introductory mentoring to confirm interest and potential, and to provide context for starting e-learning courses

Level 1 Outcomes:
- Awareness of PO's role

Level 2 Sequence:
- Post-Level 1 mentoring
- Initial assessment of competency
- Initial, restricted authorisation

Level 2 Outcomes:
- Focused pre-Level 2 mentoring

Post-Level 2 Sequence:
- Pre-authorisation mentoring
- Assessed as fully competent
- Unrestricted authorisation

TIP e-Learning Process:
1. PO roles & responsibilities, and considerations.
2. SRCA.
3. MRCA Level 1
4. VEA Primer (NSW-ACT)

Learning Process Objective:
Consolidate & apply understandings from completion of L1 e-learning courses.
Demonstrated ability to complete a simple MRCA, SRCA, and VEA claim.
Consolidate & apply understandings from claims preparation experience and post-L1 mentoring in ESO and completion of L2 e-learning courses.
Demonstrated ability to:
1. analyse a decision or determination, and
2. decide the best course of action.

* Mentoring: The activity of supporting and advising someone with less experience to help them develop their competence.
(ii) the self-directed e-learning courses and course content in the central column to be completed mandatorily before progression to the relevant face-to-face course, and

(iii) the face-to-face course learning objectives;

b. to the left of the columns, the various levels of learning and, in particular, the intended outcomes at each level; and

c. the learning pathway; viz, the flow between the various activities and levels of learning.

21. **Objective.** The objectives towards which the learning pathway is directed are ESO practitioners:

   a. with significantly enhanced competency,
   
   b. pursuing continuous performance enhancement through self-directed learning,
   
   c. accepting personal responsibility for attaining the highest possible level of practice, and
   
   d. integration of TIP and ESO training and competency development activities.

**Transition to Adult Learning**

22. **Transition Diagram.** The diagram following overleaf depicts the current and future TIP NSW-ACT course delivery methods, the considerations relevant to each and the transition pathways between them.

23. **Explanation.** The current and future training materials participants access are depicted at the top of the diagram, the various characteristics of teaching and facilitating in the middle section, and the post-face-to-face course learning processes and ESO responsibilities at the bottom of the diagram. The central importance of learning styles is depicted across the transition path between teaching and facilitation, emphasising participants’ need for their individuality to respected by the way in which the facilitator conducts the course.

24. **Implicit Objectives.** Importantly, the diagram shows that hardcopy documents are being replaced by electronic access to web-based information. TIP NSW-ACT intends that four objectives be met by this transition:

   a. developing a habit of referral to web-based information,
   
   b. reinforcing participants’ knowing where information is to be found,
   
   c. reduced training costs by eliminating printing and courier expenses,
   
   d. maximising the likelihood that current information will be accessed, and,
   
   e. encouraging the elimination of (rapidly obsolescing) hard copy documentation in ESOs.
25. The effectiveness of the refined training pathway and transition to adult learning facilitation outlined in this paper must be subjected to monitoring and evaluation. The methods and measures have yet to be identified and authoritative data will be gained only if ESOs, DVA and TIP collaborate within a monitoring and evaluation system. TIP NSW-ACT will, however, be taking steps towards identifying an initial set of measures during the latter part of 2015.
26. TIP presenters’ transition from didactic teaching to learning facilitation is, arguably, one of the most demanding changes TIP can expect of its Presenters. To be ready for the facilitation of learning from 1 January 2016 will necessitate a profound re-orientation to their task by Presenters in the next ten months. TIP NSW-ACT will be conducting an adult-learning train-the-trainer activity in July 2015 to facilitate the transition.

27. The major change will, however, be in the mindset of each individual Presenter. Of necessity, therefore, the majority of the transition will be completed by Presenters in their own time. On the evidence of NSW-ACT Presenters’ extraordinary commitment and detailed course development work over the past 18 months, the TCG can enjoy a very high level of confidence the necessary mindset changes will be accomplished.

28. ESOs’ provision of OJT and mentoring will be the major challenge the learning pathway will face. Acceptance of responsibility to help trainees develop their competence will necessitate a complete reorientation of thinking by many ESO Executives. TIP NSW-ACT has already started development of OJT and mentoring guidelines to be posted on its Online Management System. The guidelines should be ready for posting in the latter half of CY2015.

29. Although TIP NSW-ACT will start to ease the burden on ESOs from 1 January 2016, it will be some time before those undertaking TIP courses from that date are ready for authorisation or to help with OJT and mentoring of those who follow them. In the interim, ESO Executives will need to set in place alternative OJT and mentoring arrangements.

NSW-ACT Training Consultative Group