

THE FOUR RESPONSIBILITIES OF THE LEARNING PROFESSIONAL

>BL



This work is licensed under a Creative Commons Attribution-NonCommercial-ShareAlike 4.0 International License (CC BY-NC-SA 4.0).

The Four Responsibilities of the Learning Professional is an initiative of
The More Than Blended Learning Company Ltd.

www.morethanblended.com



THE LEARNING PROFESSIONAL HAS A RESPONSIBILITY TO THEIR CLIENT

As a learning professional I have a responsibility to my client to help them to achieve their goals for employee performance. Doing the best for my client will often mean suggesting a solution other than the one requested. Sometimes it will mean recommending something other than a learning intervention.

WHAT WOULD YOU DO?



Your client calls you in for a meeting. He is a long-serving, senior manager who, up until recently, liaised with one of your colleagues, who has now left the company. Your client is looking for a training programme to ease the organisation's upcoming transition from Microsoft Office to Google Apps.

He suggests a suite of e-learning modules to cover each of the apps with an option of classroom training for those who still prefer this approach. He would like you to work up a proposal with a budget and schedule.

This would not be your favoured strategy for addressing the situation. What would you do?

ARE YOU A PROFESSIONAL?

When you are a professional, others seek you out for your particular expertise in a field or discipline. They will expect you to behave in accordance with the ethics of your profession, with their interests to the foremost.

The learning professional will be familiar with the tools of their trade, in particular the methods that can be used to facilitate learning. Learning and teaching methods are relatively timeless, although we are constantly rethinking the methods we should use in particular situations, in the light of new thinking about the process of learning at work, continuing research into the cognitive psychology of learning and, more recently, advances in the field of neuroscience.

A learning specialist who was inducted into the profession thirty years ago would now be seriously out-of-step with current thinking if they had not engaged in continuing professional development. Keeping up-to-date is especially important when you consider that the learning profession has been saddled with more than its fair share of pop psychology, much of which has gone unchallenged for far too long.

Learning and teaching methods are important because they determine the effectiveness of an intervention. The learning professional has to understand which methods will work in which situations, or risk pouring yet more

hard-earned corporate dollars down the drain. Each organisation is different and each functional area within each organisation is likely to be different too.

The learning professional has to strike the right balance in each case between formal, non-formal, on-demand and experiential learning to meet the particular learning requirement for the particular target audience, and in consideration of the practical constraints and opportunities. They also have to make a judgement on how much of the solution needs to rely on top-down initiatives from management and how much can be managed effectively by employees themselves from the bottom-up.

The learning professional also has to be up-to-date with developments in learning media, the technologies through which learning strategies are realised. Our hypothetical learning specialist of thirty years back would have been fully conversant with all the available media of the time, the flip charts and whiteboards, overhead projectors and video players. Unfortunately for the learning professional, learning media do not stand still like methods; we

have seen an almost exponential growth in available media as computers and mobile devices interact over high-speed networks. Whichever method you intend to use in an intervention, you now have many more choices when it comes to the means of delivery. Do you want to hold that discussion in a face-to-face workshop, in a live online session, through a teleconference or using an online forum? If you want to share some content, do you print out a booklet, stick it on a web page or record it as a podcast?

The learning professional does not have to be an expert in each new technology, but they do need to know the essential characteristics and properties of each medium, the opportunities and limitations that these afford and the applications for which each is best suited. There can be no such thing as a technophobic learning professional, any more than there is a doctor who is not aware of the latest treatments or an accountant who is not familiar with the latest legislation.

WHAT IT MEANS TO BE A PROFESSIONAL

To be a professional means a lot more than simply doing whatever the client wants. You wouldn't hire an interior designer only to inform them that you've already chosen all the colour schemes and furnishings; you wouldn't engage an accountant and then explain to them the way your figures should be processed (unless of course you worked at Enron); you wouldn't employ a fitness trainer and then tell them what to include in your workout; and you wouldn't buy a dog and then insist that you do all the barking.

So why, then, do we continue to encounter situations in which line managers tell the guys from L&D exactly what they want in terms of learning interventions, with the expectation that they'll simply take these instructions and run with them? You'd like a six-hour e-learning package to train customer service staff to sell over the telephone? A two-day workshop to teach every detail of a new company system to all employees, regardless of whether or not they will be using it? A one-hour podcast

to teach manual handling skills? No problem. That's what we're here for, to meet your requirements.

Hang on a minute, you're probably thinking. This isn't an encounter between a professional and a client, it's simply order taking.

When asked to jump, a professional does not ask 'how high?'. They say, 'Let's talk about this a little, because jumping may not be the best solution for you in this situation.' And if this tactic doesn't work and the professional is told in no uncertain terms that jumping is the only acceptable option, then he or she has two choices: either they resign and get another job where their role as a professional is properly valued; or they agree to go ahead, but only after having expressed quite clearly in writing that jumping is against their best advice.

Learning and development isn't common sense; it isn't intuitive. If it was then experts wouldn't lecture at novices for hours on end; they wouldn't insist on passing on everything they know, however irrelevant, however incomprehensible. That's why we have learning professionals,

so they can explain, in terms that the lay person can clearly understand, how people acquire knowledge, develop skills and adapt to new ideas, and how best to support this process. If the customer doesn't hear this advice, they will assume that the people in L&D are just the builders, not the architects; and, if no-one seems to be offering architectural services, they'll take on the task for themselves.

TO WHAT EXTENT ARE YOU MEETING YOUR RESPONSIBILITY TO YOUR CLIENTS?

Which of the following apply to you?

- I make every effort to understand the real, underlying needs of my clients.
- I would try not to discuss solutions with a client before I fully understood the nature of the requirement, the characteristics of the target population and the logistical constraints.

- If I did not feel that any type of learning solution would help the client to meet their needs, I would make clear to the client why this was the case and suggest they take alternative action.
- Given that a learning solution was necessary, I would not accept the client's request for a particular approach if I was not comfortable that this would meet the client's needs effectively and efficiently.
- In designing and delivering a solution, I would always be mindful of the client's underlying need and do my best to make sure that the solution satisfied the need.

THE LEARNING PROFESSIONAL HAS A RESPONSIBILITY TO THEIR LEARNERS

As a learning professional I have a responsibility to the learners who participate in any learning intervention that I conceive or facilitate. I want these learners

to be inspired and grow in confidence. I want to help them achieve their own goals for personal development. I want to do them no harm, by boring them, overwhelming them, embarrassing them or peddling them untested remedies.



WHAT WOULD YOU DO?



You are on your way back from a client meeting when an employee – who has previously attended one of your courses – spots you and comes over. He wants your advice about ways that he could hone his presentation skills.

Apparently he has an important meeting coming up in a couple of weeks at which he will be pitching for a significant investment from senior management.

It so happens that you run presentation skills workshops. You also provide a private, one-to-one coaching service for public speakers.

More pressingly, you are running late for a lunch appointment and are buzzing with thoughts from your client meeting.

How would you respond to the request?

DO NO HARM

One of the key differences between professions and other forms of occupation is the fact that professionals are bound by ethical codes.

If they contravene these codes they are liable to be disbarred from their profession. Doctors sign a Hippocratic oath which binds them to *do no harm to their patients*. Their patients' interests take priority over those of any body which employs them or their own opportunities to make financial gains.

Now we all know that, in practice, some doctors, lawyers, bankers, accountants and other professionals do break this trust and put themselves first, but generally we are shocked when this happens and expect the transgression to be dealt with firmly.

Those responsible for managing the learning of adults in the workplace also like to be regarded as professionals. But you don't become a professional just by calling yourself one. You have to behave like one too – a trusted

consultant not an order taker, an architect not a builder. Just like doctors, learning professionals have a duty of care – *to do no harm to learners*. This might seem like a no-brainer – after all, which learning professional does *not* care about the welfare of learners?

Teaching and training are, after all, people professions. But in practice there are strong competing interests:

- of senior managers, to keep costs and time commitments to a minimum;
- of subject experts, to cover in any courses or materials every possible aspect of their particular subjects;
- of compliance departments to tick boxes;
- of colleagues who want to strut their stuff, avoid change, keep life simple, promote their own causes, and so on.

If the learning professional pays disproportionate attention to these interests, then what harm can they do to learners?

- They can overwhelm them with content, leaving them frazzled.
- They can fail to engage them emotionally, so they lose attention and get bored.
- They can fail to establish the relevance of a learning activity, causing anger and resentment.
- They can patronise them with activities that are insufficiently challenging.
- They can embarrass them with activities that have the potential to humiliate them in front of their peers.
- They can provide them with inadequate opportunities to practise new skills, so they never have the confidence to put their new skills into practice.
- They can fail to provide sufficient follow-up resources in the workplace, so the learning quickly fades into oblivion.

- They can fail to act on what we know about the science of learning, thus plying their learners with dangerous quack medicines. A doctor may believe in homeopathy or an astronomer in astrology, but it is wholly inappropriate for them to apply these ideas in their work. Professionals are rationalists not romantics.

Learning professionals may calculate that, by putting the interests of management, subject experts and others above those of the learner that they will benefit personally because they are 'getting things done'. But this is short-term thinking, because if you do learners harm then they can break you all too easily:

- They may only engage in learning activities when they are forced to.
- They may not learn what you want them to learn – and you cannot force anyone to learn something, at least not in any deep or meaningful way.

- They may make no effort to put your ideas or instructions into practice.
- They may complain about you and your courses – not openly, on your evaluation forms, but more dangerously, to their peers.

It takes courage to stick to your principles even when under pressure from people in power. But courage is surely what you expect of a professional. If you haven't got it in you to be courageous, then are you in the right job?



DOING NO HARM DOES NOT MEAN DOING NOTHING

There are situations in which it is not a good idea for learners to choose for themselves *what* they learn. A good example would be novices, who are poor judges of what they should or should not study, simply because they do not know what they do not know.

In other situations, a person may be completely unaware of the potential benefits that may be afforded by a new skill or way of thinking – it takes the input of a learning professional to make those benefits apparent. And ‘doing no harm’ does not always mean allowing learners to choose *how* they learn.

Learners often make bad decisions about how they study. As Peter Brown explains in his book *Make it Stick*, ‘We are poor judges of when we are learning well and when we’re not.’ He gives the example of how often students revise by simply re-reading, when this has been proven to be a poor strategy for study.

And students frequently engage in cramming, which Brown likens to binge-and-purge eating: ‘A lot goes in, but most of it comes right back out in short order.’

Learners want the easiest possible route to their learning goals, but the learning journey may have to be a tough one. It would be nice if you could learn the piano in a few minutes here and there but, to achieve any sort of satisfactory result, it is going to take many hundreds of hours of concentrated effort. The learning professional knows what work is required and does what they can to motivate the learner to stick at the task, much like a personal trainer in a gym.

So, at various times and to various degrees, learners may not know what to learn or how to go about the process of learning. In these situations, the learning professional has a valuable role to play in providing the learner with the assistance they need.

However, just as a parent has to learn to let go when a child enters adolescence, a learning professional has to back away and allow a learner to develop independently as soon as this can be achieved without undue risk to the learner and to those with whom he or she interacts.

TO WHAT EXTENT ARE YOU MEETING YOUR RESPONSIBILITY TO YOUR LEARNERS?

Which of the following apply to you?

- I take active steps to get to know my learners – what they already know, what interests them, their hopes and their fears, etc.
- I do what I can to shape any learning experiences or resources that I design, deliver or recommend to respond to the needs of my learners.
- I make sure I do not unnecessarily place learners for whom I am responsible in potentially embarrassing or overly stressful situations.
- I do what I can to avoid overwhelming learners with more learning content than they can cope with at any one time.
- I would not recommend a particular model, theory or practice without clear evidence that this is likely to be effective.



THE LEARNING PROFESSIONAL HAS A RESPONSIBILITY TO THEIR PEERS



As a learning professional I have a responsibility to my fellow professionals to uphold the ethics and standards of my profession, and to do nothing that would damage our collective credibility. In the work that I carry out, I want to enhance the reputation of learning professionals as trusted consultants and skilled practitioners; as people who can be relied on to put the interests of their clients and their learners first.

WHAT WOULD YOU DO?



You are meeting with a colleague who recently joined your organisation, fresh from studying the psychology of learning at college. She has been given the task of re-designing the induction programme and wants to discuss her ideas with someone more experienced, which means you.

She mentions that she just saw you talking to someone on your way to the staff restaurant. This person happens to have been a student of yours. She asks you what it was all about.

She goes on to confide in you that she thought her own induction was really poor – the trainer seemed to have no idea about how people learn. She wonders what you think about this person's work.

She suggests re-designing the programme to take account of the latest findings from neuroscience. She has some particular ideas, including the use of online resources to reduce the amount of information covered in the formal sessions.

She also asks your opinion on whether new starters should be given a knowledge test on their first day at work to check what they already know about the company.

Finally, she asks you for ideas about how she should develop herself professionally. She has one suggestion, which is to form a community of practice for learning professionals in the organisation.

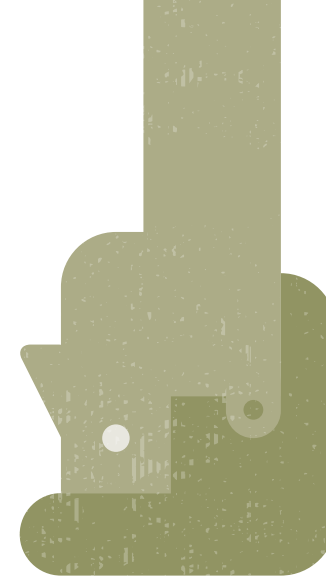
How would you respond to her various suggestions and questions?

DON'T BRING YOUR PROFESSION INTO DISREPUTE

The situation described above raises a number of issues about what it means to be part of a professional community. As a learning professional you do not stand alone, you are a representative of the profession and have a responsibility to build and maintain its reputation. We use the word 'build' advisedly because the learning profession does not have the best reputation at the moment. It is certainly not seen by many as equivalent in status to medicine, law, accountancy, architecture and similar occupations – in fact many of your clients may not recognise what you do as a profession at all.

If you work with internal clients, the danger is that you are seen as simple order takers, brokers liaising with course builders and course providers, much like travel agents booking holidays (and we all know what happened to them). One colleague (and because we are professionals, we will not divulge who this is), lamented that her department was seen as no more than the people who supply the biscuits.

Maybe you don't work directly with clients – you may work as one of those who develops courses. The danger here is that you are seen as someone whose job is to carry out instructions without question, like builders working to an architect's plans. Or perhaps you deliver courses in a classroom. Again, the expectations may be no more than that you present your expertise, put on an engaging performance, or give employees a good day out. All of these may be useful services in some circumstances, but they do not make you a professional – sorry, but you are mere operatives.



Every time you act as an order taker rather than a consultant, you are letting down the whole profession. Every time you develop or deliver content without question as to its efficacy you are doing the same. Every time you promote a now discredited theory, you are doing even more damage – you are not only risking the whole profession being seen as quacks and new age romantics, you may well be harming learners. To put it bluntly, every time you behave unprofessionally, you reinforce undesirable stereotypes and make it much harder for your colleagues to fulfil *their* roles as professionals.

BEHAVE ETHICALLY

All professions require those practising to exhibit high ethical standards. At very least we should expect the following of our learning professionals:

- Respecting and obeying the law
- Not taking advantage of their position of power to extract favours from students.
- Not revealing confidential information about any student
- Protecting students from conditions detrimental to their learning, health and safety
- Not publicly criticising their colleagues

The relationship with students is particularly important. As John Hattie describes in *Visible Learning and the Science of How We Learn* (2013): 'Students value being treated with fairness, dignity and individual respect. These threefold aspects have emerged strongly in all studies in which students are interviewed and surveyed as to what they expect of their teachers.'



CONTRIBUTE TO THE COMMUNITY

Amongst other things, a profession is a community of practitioners and communities provide very little added value if its members simply keep themselves to themselves, satisfied that they have the appropriate letters after their name and the right credentials on their LinkedIn profile.

The more the members of a community engage with each other, the more value the community provides. This works in two ways: when you are a new entrant to the profession, you can call upon the expertise of more experienced members; and as you gain experience yourself, you become a resource from whom others can benefit.

There are many ways in which you could contribute to the community of learning professionals:

- Attend meetings of the community. Once you are settled in, make an effort to network and participate in discussions. So much learning is serendipitous, but those chance meetings that change your life cannot occur if you don't put yourself out there.
- Take advantage of articles, blog posts, videos and other content that is provided by the community. Share content that you find useful with your colleagues.
- Level up by asking questions at events, commenting on interesting content and providing answers to forum questions. Level up again by presenting your own ideas and experiences, either live at events or in the form of blog postings. Yes, you may find this difficult and scary at first, but all great communicators

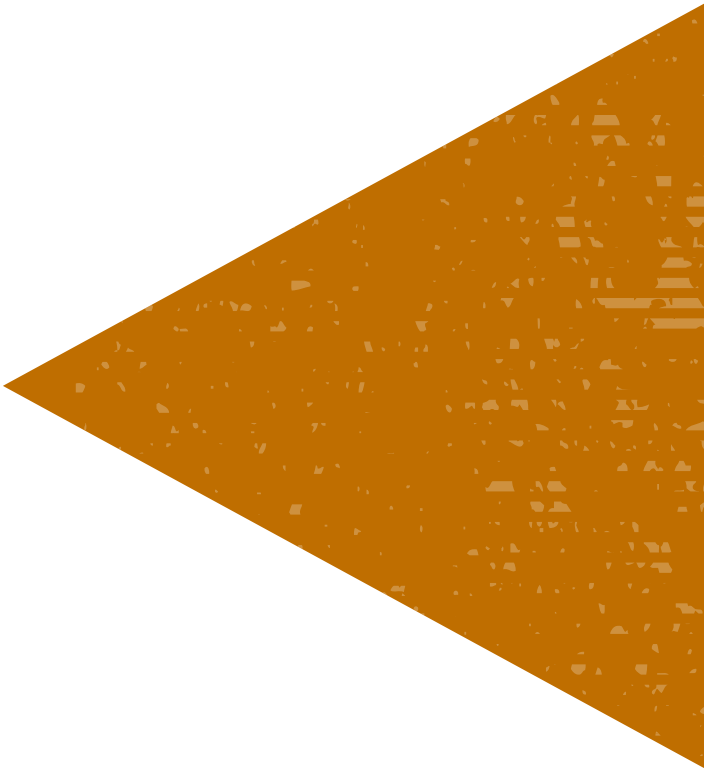
have to go through this stage. Do not underestimate your own abilities.

- Level up yet again by putting yourself forward to help manage the community. Now you really are putting something back (as well as elevating your status and reputation).
- Attain the highest level by volunteering to mentor new entrants to the profession. By modelling good professional practice, you will positively influence the next generation of professionals.

TO WHAT EXTENT ARE YOU MEETING YOUR RESPONSIBILITY TO YOUR PEERS?

Which of the following apply to you?

- I assert my professional status in interactions with clients, senior managers and subject experts, even when I may be junior in rank.
- I ensure that learners can place their trust in me entirely and I would never abuse my position of authority.
- I would never speak in derogatory terms about my colleagues.
- I do my best to help those joining the profession to develop and maintain their own standards.
- I actively contribute to communities of practice and professional associations to encourage higher standards across the profession.





THE LEARNING PROFESSIONAL HAS A RESPONSIBILITY TO THEMSELVES

*Finally, as a learning professional,
I have a responsibility to myself
to make sure I am fully up-to-date
with current best practice and
evidence-based learning theory,
that I am constantly reflecting upon
and looking to improve my skills,
and that I am conversant with
the latest technologies that could
enhance learning in terms of its
effectiveness or efficiency.*

WHAT WOULD YOU DO?



THERE IS NO SUCH THING AS A TECHNOPHOBIC PROFESSIONAL

In the situation described above, it would be easy to answer 'yes' to every suggestion, just because you want to show willing, which might be sound thinking at a time of change. However, the true learning professional would not have any doubts – they would regard continuing professional development (CPD) as a given.

Unfortunately, CPD is often seen as an administrative chore, something you have to do to satisfy the requirements of a professional body; keeping those letters after your name. But the idea that a professional would not want to keep up to date would seem to others to be quite extraordinary.

Take the example of an architect. How could they function without keeping up-to-date with the latest building techniques, legislation, materials, and the latest developments in electrics, plumbing and lighting? Imagine a dentist who wasn't aware of the latest treatments and equipment?

Your manager has called you in for a chat about your development. She has ambitious plans for the department and wants to modernise many aspects of what the department does.

Your manager explains that the department will be making much greater use of technology. She suggests you engage in some development activities to update your skills.

She requests that you act as a mentor to a new colleague who has just joined the organisation having recently completed a course in the psychology of learning. The idea is that, in return, your colleague shares with you the latest in terms of learning theory. Your manager

suggests that some of the latest research findings are likely to challenge some of your accepted practice but that you should be open to them.

Finally, she suggests that you might want to take more active advantage of your professional membership to both help you update your knowledge and to share your expertise with others.

How would you respond to her various suggestions?

They would soon be unable to provide an adequate service and would rightly be ushered out of the profession.

The idea of a technophobic architect or dentist seems ridiculous, and yet with learning professionals it is somehow the norm. The 2015 Benchmark Report¹ published by Towards Maturity and based on the data supplied by more than 600 organisations, tells us that only 28% of respondents believe that L&D staff are confident in using new media. A report published in April of 2015² by the Chartered Institute of Personnel and Development showed that, in many cases, particularly those that involve the use of technology, available skills simply do not match business priorities.

1_ Embracing Change: 2015-16 Industry Benchmark Report published by Towards Maturity, November 2015

2_ L&D: Evolving Roles, Enhancing Skills, published by the CIPD and Towards Maturity, April 2015

In the Learning and Performance Institute's annual report³, Chairman Donald Taylor describes how 'We are shifting towards that long-predicted greater use of learning technologies, but at a far slower pace than the hyperbole would have us believe.' This is even though the Towards Maturity Benchmark Report clearly shows that organisations would be pushing against an open door if they wished to make more use of technology.

The new self-directed learner is motivated:

- 76% want to do their job faster and better
- 75% like to learn just for their personal development
- 81% are happy to engage with online learning without prompting

3_ Learning and Performance Institute, Annual Report on Workplace Learning, August 2015.

They also understand their own needs:

- 74% know how to access what they need for learning
- 53% find access to learning via mobile essential
- 42% access learning at the point of need

Learners are certainly embracing CPD and they are happy to make use of technology if that helps them to achieve their goals. And they expect learning professionals to be perfect role models in this respect.

It is perhaps understandable that some learning professionals are apprehensive about technology, because they see computers as a threat to their job, a fear that is rarely talked about openly, but which is actually widespread. Yet there is little to be scared of. After all, people are not taught by computers, they are taught by teachers. Every piece of digital content is designed by teachers; every online course is moderated and facilitated by teachers. Media channels change but human beings do not, and neither does the way they learn.

TO BECOME A TRUE PROFESSIONAL TAKES TIME

Another important argument for CPD is that professional skills take time to master. To be cynical, you might say that if a doctor claimed they were ready to practise having just completed a five-day course you'd be horrified; if your electrician said they were happy to re-wire your house having attended a webinar you'd be equally astounded; but if your trainer said they were fully-equipped having attended a three-day train-the-trainer you wouldn't be surprised at all. And yet it takes as long to become an effective learning consultant, designer or facilitator as it does to become a skilled professional or craftsperson in other fields. Your success depends on a long apprenticeship involving the following elements:

- Subject matter expertise in those topics that you are responsible for teaching.
- A thorough understanding of the principles underlying effective adult learning. Practical skills honed over hundreds of hours of deliberate practice, supported by coaches and others who can provide informed feedback.
- Problem-solving skills developed through years of experience, enriched by personal reflection and engagement with peers.

AND THINGS CHANGE

Another powerful argument for CPD is that so much is changing in the world of learning and development and we owe it to ourselves, our peers, our clients and our learners to be fully up-to-date. We have already addressed the fact that so many learning professionals are slow to engage with technology, perhaps more so than any other professional group. However, technology provides only another channel for learning and impacts more on the scalability, flexibility and cost-efficiency of what we offer than it does on effectiveness.

As we have said before, people and the underlying basis on which they learn does not really change, even though they might be sporting the latest mobile devices. What has changed, however, is our understanding of *how* they learn and, in particular, how they learn most effectively.

If you underwent your basic training more than ten years ago (or, just as likely, you did your training more recently but the principles you were taught were out-of-date) then you will be missing out on the benefit of a wealth of ground-breaking research.

Learning psychologists and neuroscientists have made great strides in recent years. To provide just a few examples, we now know:

- how easy it is to overload a novice learner with information;
- the importance of deliberate practice spaced over time;
- how best to combine visual and verbal input;
- the power of storytelling;
- how active learning can take place without any interaction;
- how all new learning must be linked to prior learning.

We also know that many ideas that are common within the L&D community are based on poor science or, in most cases, no science at all. If you are squeamish, look away now:

- learning styles
- neuro-linguistic programming (NLP)
- MBTI
- 70-20-10
- Dales Cone of Experience

We cannot afford to be romantic about the theories we pass on to learners. As professionals we must, first and foremost, be rationalists, just as we would not expect our doctors to recommend herbal medicines or astronomers to plan their lives on the basis of astrology. If one of your pet theories is on the list above, then don't reject it out of hand, because there may be some really good ideas hidden within the psychobabble. But you won't know until you've read the science.

A learning professional cannot keep their head down and hide away, yet figures from the Learning and Performance Institute Capability Map, to October 2015, showed that only 1229 of 2416 respondents believed that industry awareness was part of their role.

As learning professionals, we have to face the challenges imposed by change as well as take advantage of the opportunities. The effort is worth it, because this is a career in which you can express your creativity and provide a service that simply can't be beaten – that of helping people to fulfil their potential, to grow in confidence and self-belief to such an extent that they have no need for you any longer.

TO WHAT EXTENT ARE YOU MEETING YOUR RESPONSIBILITY TO YOURSELF?

Which of the following apply to you?



- I remain sceptical about any theory of learning and teaching until I have seen convincing evidence.



- I would be prepared to change my practice if new evidence suggested that what I had been doing was invalid or ineffective.



- I deliberately seek out ideas from people who have different perspectives, specialisations and interests from my own.



- I take active steps to make sure I am up-to-date with new ideas and developments.



- I make sure I am familiar with new tools and technologies that could have useful applications for learning.

We hope you've enjoyed reading this short book and feel inspired to both assert your own status as a learning professional and to encourage your colleagues to do the same.

If you're in agreement with us about the importance of the four responsibilities, we encourage you to go to the four responsibilities website where you can indicate your support. Working together we can do something positive to lift the status of learning professionals around the world and, as a result, have a much greater influence on the organisations that we represent.

www.four-responsibilities.org