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Chartered Institute of Personnel and Development

**Professional Development Scheme**

**Specialist Personnel and Development**

**Designing and Delivering Training**

**November 2007**

**15 November 2007      09:50-12:00 hrs**

**Time allowed - Two hours and ten minutes**  
(including ten minutes' reading time).

**Answer Section A and SEVEN of the ten questions in Section B.**

**Please write clearly and legibly.**

**Questions may be answered in any order.**

**Equal marks are allocated to each section of the paper.**  
**Within Section B equal marks are allocated to each question.**

**If a question includes reference to 'your organisation', this may be interpreted as covering any organisation with which you are familiar. If you are an independent training consultant you may draw examples from differing organisations when answering questions.**

**The case study is not based on an actual company. Any similarities to known organisations are accidental.**

**You will fail the examination if:**

- **you fail to answer seven questions in Section B and/or**
- **you achieve less than 40 per cent in any section.**

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#### SECTION A – Case Study

**Note: It is permissible to make assumptions by adding to the case study details given below provided the essence of the case study is neither changed nor undermined in any way by what is added.**

Conceptua plc is a high street department store with 28 branches in the major cities in the UK and Ireland. From its base in Edinburgh, established over 80 years ago, it is recognised for the quality of its personal service. Conceptua enjoys the benefit of longstanding customers over a number of years, together with an impressive product range from accessibly priced merchandise to more exclusive lines. The client base gives the company a reputation for being a market leader, not a market follower.

The company is run on guiding principles and values that are rooted in outstanding customer care. This is reinforced through the performance review and development processes, which are generally well respected by the 3000 staff and are operated effectively by line managers. Attention to detail and 'going the extra mile' are key attributes that are sought through the recruitment and selection process. The Chief Executive Officer (CEO), Amanda, has commented in the past, "we select for attitude and train for skills." Growth is slightly above target at five per cent, despite some sensitivity in the retail sector. Sales margins remain buoyant, although controlling costs through the centrally allocated budget remains a continuing challenge. However, staff costs in relation to growth, which include training and development, are showing signs of increasing.

In the effort to maintain their predominant position, the pressures to retain the distinctive customer buying experience are taking their toll on staff. Their welfare has largely been overlooked in Conceptua's drive to satisfy customers and, as the age profile increases, this is likely to be a continuing issue. The drive to increase customer satisfaction ratings further is having an adverse effect on staff, as stress is a key reason for staff absence. There are management concerns about the rising trend in sickness absence, particularly in terms of longer-term sickness. There are more staff needing longer spells of absence to recover from illness. When they return to work they have a phased period to prevent recurrence. This places additional pressure on other staff who cover during absence and do additional shifts so that shops are fully staffed.

The CEO has heard about the practices of other organisations and wants to launch an initiative titled 'Developing a Work Balance' so that both employers and employees can plan how to improve their lives and maintain their health. She aspires to build a company in which the staff have as good an experience in the store as the customers. A specific project budget of £150,000 has been set and Amanda sees training as having a vital role to play. She is open to suggestions about how best to tackle this important issue, although she recognises that this will not lead to a quick fix with immediate benefits. The existing training team, which mainly deals with induction, health and safety and procedural training, reports directly to the Human Resources Manager. The team comprises three regional training officers, who work with a training representative in each of the stores, and an administrator.

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**As the newly appointed senior training consultant to Conceptua, write a formal report for the CEO that identifies the role that training has to play in 'Developing a Work Balance'. In drafting this report, use your knowledge of research and wider organisational practice and focus on three key areas:**

- 1. Analyse the consequences of failing to address the current people management issues before making any decisions about further training action.**
- 2. Produce a suggested outline design for two days of appropriately designed and delivered training that will launch the 'Developing a Work Balance' initiative. Justify this in terms of design principles, value and timeliness.**
- 3. Justify how training messages and learning outcomes can be consolidated when staff return to work after this training.**

*You should spend 50% of your time on 2, 25% on 1 and 3.*

**PLEASE TURN OVER**

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#### SECTION B

**Answer SEVEN of the ten questions in this section. To communicate your answers more clearly you may use whatever methods you wish, for example diagrams, flowcharts, bullet points, so long as you provide an explanation of each.**

1. A line manager asks you, a senior training consultant:  
"Why do you expect me to coach staff when they return to work from a training course? Haven't they been trained properly?"  
Using your knowledge of research, provide a well-justified response.
2. In light of the national skills shortage in the United Kingdom, identify and justify **at least three** ways that a Training Manager (TM) could encourage her organisation to participate in skills training for its staff.
3. Use your knowledge of research to justify the criteria you will use in selecting a training activity for a specified skills development programme.
4. Describe, with reasons, the contribution a training department can make when working in collaboration with recruitment and selection processes.
5. Your Learning and Development director asks:  
"I have a meeting in a few days' time with a training consultant to discuss a forthcoming customer care programme for our 2,500 staff. What formative and summative evaluation techniques should we include in the training design?"  
Use your knowledge of research and wider organisational practice to provide an informed response.
6. Explore the ways that e-learning might be used in order to reduce time spent off the job in a knowledge development programme.
7. Your Information and Communication Technology Director asks:  
"As there is so much change in the technical world, how do I keep the knowledge and skills of my staff up to date?"  
Provide a well-reasoned response.
8. Explain how variances can occur in an organisation's training budget and justify the action a Training Manager could take in response to such variances.

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9. As a mentor to a junior member of the training department, you are asked:  
“I regularly have difficulties dealing with dominant delegates, especially those older than me. How can I ensure that I don't allow them to take over so that everyone has the opportunity to participate?” Justify the advice you will give.
10. Your training director comments:  
“I think we should do a roadshow to all the regional outlets in the UK, to increase understanding of the training function.”  
Provide arguments to **EITHER** support **OR** challenge how effective this course of action would be in developing a positive perception of training in your organisation.

**END OF EXAMINATION**

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#### Introduction

Thirty one candidates from five centres took this specialist PDS elective at the November 2007 diet. The results, subject to moderation are as follows:

<b>November 2007</b>		
<b>Grade</b>	<b>Number</b>	<b>Percentage of total (to 1 decimal point)</b>
Distinction	0	0.0
Merit	1	3.2
Pass	12	38.7
Marginal fail	5	16.2
Fail	13	41.9
<b>Total</b>	<b>31</b>	<b>100</b>

*The figures shown are simply calculations based on the number of candidates sitting the examination in November 2007, whether for the first or a subsequent time, and are for interest only. They are not to be confused with the statistics produced by CIPD headquarters, which are based on the performance of candidates sitting the examination for the first time. It is from these figures that the national average pass rates are calculated.*

The overall pass rate was 41.9%, a significant drop from the result in May 2007. This is most disappointing and reflects a poor set of scripts overall. To generalise from these scripts, I would suggest that too many candidates gave the process of an answer rather than demonstrating the application of knowledge to the context of the given question. Candidates who did not pass tended to offer advice about how to (for example) design training for a high street department store without actually doing it. This then fails against the thinking performer, business partner criteria as candidates gave the impression of simply recreating their knowledge (revision notes?) instead of demonstrating the contribution that training can make to support business issues. I also have to say that some scripts would struggle to demonstrate competence at level 3 (Certificate in Training Practice). Future candidates must accept that in tackling a specialist standard they need to demonstrate higher levels of ability than just making generalised statements in the hope that they will pick up some marks.

The fact that there are more marginal fails at this diet reflects the poorer result, so five candidates will be considered at the January moderation process. Over 60% of candidates who sat the examination had previously attempted this paper and I wonder whether this influenced the result.

Both sections suffered similar drops in standard. The pass rate for Section A was 48.4%, down 14% from May 2007 – four merits and eleven passes and only one marginal fail. In Section B, the pass rate was 38%, down from 54% in May: twelve scripts were over the pass standard – two merits and ten passes. Of the not-to-standard candidates, four were marginal fails and fifteen were fails.

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Any guidelines expressed here do not claim to offer specimen or model answers. Instead, they indicate the flavour of acceptable answers and also show how each question, including the case study, is linked to the performance indicators and indicative content of the Standards.

#### Section A

Presentation of answers by too many candidates was poor as they did not use a report format as requested in the brief. As I indicated above, poorer candidates gave a process of an answer, or made tentative suggestions and following comments were typical:

*"Simmonds model could be used"*

*"A model such as CIRO could be used"*

*"Perhaps you could introduce . . ."*

*"The course will have balance by . . .", yet this was not demonstrated in the design*

*"Include any pre-course reading", without indicating what this might be*

Others made too many assertions and did not justify their point of view. For example:

*"It will be two days off site", but this was not costed*

*"Use an external training consultant", despite the appointment of a new senior training consultant*

*"Use role plays", without indicating the purpose*

Overall, too many candidates produced independent lists of training content, lists of training methods but did not show any skill in applying content to process in a professionally constructed piece of training.

This examination highlighted candidates' poor knowledge of research and wider organisational practice. There was the usual hagiography of Purcell, and the Annual CIPD Learning and Development surveys, but the utility of the research was rarely considered. Some candidates simply referred to "CIPD research" without any attempt to identify a particular report. One candidate however, did show the ability to apply knowledge of the Holton learning Transfer System and gained valuable marks for such.

The use of wider organisational practice needs to be considered more carefully as some candidates continue to quote practice without showing the relevance to the case context. One candidate suggested that as the Post Office starts training courses very early in the morning so this should be used by Conceptua!

#### Task 1

The consequences of **not** doing something are rarely considered by students, so task 1 presented a challenge for them to address the key drivers for the training. For the given case, these will include rising costs which damage profitability, loss of staff

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and therefore risking the customer buying experience, which could result in further losses to internet based retailing.

This part of the case was generally well-handled although the greater the level of analysis as opposed to restatement resulted in higher marks.

#### Task 2

The presentation of the design was, with a few exceptions, poor. Key to a successful answer is the writing of learning outcomes, a matter that escaped too many candidates. There continued to be confusion between business or project objectives and learning outcomes that need to be expressed behaviourally. A few candidates did state that (for example) Mager discusses three elements of an objective yet were reluctant to demonstrate their ability to apply this to the case.

Once again, some candidates described the process of how to design a training event, often quoting Harrison's eight stage model, or Simmons seven questions, but failed to *apply* this to the case. Simply restating knowledge, or worse still, recreating revision notes in an examination booklet will not convince the examiner that a candidate has the required level of competence at M level. Reciting almost as a mantra that training must be horizontally and vertically integrated into the business is absolutely meaningless without a demonstration of how this would be applied to the retail context.

Candidates' knowledge of research remained poor, especially around learning theory. This is mainly limited to learning styles but they seemed unable to consider anything other than to screen learners before a course and adjust the design to reflect the dominant style. Current wisdom challenges such a view and I expect candidates to understand this.

There were a few interesting designs presented, and those who argued to split the event into chunks to allow for workplace consolidation often justified their decision well to maintain cover in the stores. Others suggested a central England location for training apparently ignoring the fact that Conceptua is based in Edinburgh.

#### Task 3

Too many candidates ran out of time to give adequate treatment to this question. Those who did covered reinforcing messages through notice boards, intranet and ensuring induction processes covered work home balance. The less successful candidate relied on generalise statements such as "*communication and leadership are vital*" without specifically identifying what needed to be done.



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#### Section B

##### Question 1

Despite this being a question that specifically asked candidates to draw on research, it was attempted by 28 candidates and produced 4 distinctions, and 8 passes. Reference to the Annual Learning surveys was popular as they have shown the increased need for coaching to reinforce training course messages and provide the opportunity for learners to consolidate their skills. *How People Learn* was also a valuable resource. There was useful comment about learning taking place at work by application at work and developing learner's experience. Knowing what, as opposed to knowing how, was generally well-handled. Some, but not all, considered whether the line managers had the competence to coach. Reference to the learning (as opposed to training) design would also have been useful.

##### Question 2

Answers should have been linked to productivity in 'the war for talent'. Lack of UK skills affects our global position and with one third of adults not having school leaving qualifications, the UK will need to import more labour. Whilst initially this may not prove expensive, the effects in the future need to be anticipated. The successful candidates focused on initiatives such as Train to Gain, signing the skills pledge and using NVQs.

Of the 25 candidates who attempted this question only 7 achieved a pass mark or higher. The poorer candidates made generalised comments such as "*training is good*" or failed to justify their assertions. Others simply restated Government initiatives rather than answering the question.

##### Question 3

This was the least popular question on the paper, perhaps because it required reference to research. Ten candidates attempted the question and 3 passed. The issues would include the topic, the level of course attenders, the size and dynamics of the group, logistics, ethical issues and health and safety concerns. The standard text for the standard by Simmonds reveals a number of relevant sources such as Woodall and Winstanley, Knowles, Wilson and Barclay. As in other answers, those candidates who did not justify their criteria did not reach a pass standard.

##### Question 4

Of the 26 candidates who attempted this question, 11 passed. Disappointingly most candidates adopted a single focus of succession planning, but the more informed did discuss training in recruitment and selection processes, particularly for line managers to ensure adherence to company policies, including induction. Some of those not reaching standard saw the question simply as a training needs analysis issue and restated that this can be covered at three levels.

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#### Question 5

Sixteen candidates attempted this question and 5 passed. There was widespread confusion about formative and summative evaluation. Formative evaluation concerns checking that the training was effective at event level, so this would concern the progressive challenges of learning; ensuring satisfying the learning objectives, and using quizzes, tests, role plays and question and answer sessions. Summative evaluation needs to address organisational value from the event, so it would measure improved behaviours at work and the resultant improvement in performance such as increase customer satisfaction, reduces complaints.

Most candidates missed the context of the question – a customer care programme and provided generalised accounts or restatement of evaluation theory. . Kirkpatrick says . . . .

#### Question 6

The use of pre- and post-testing of knowledge would be a useful starting point to this question, but candidates needed to do more than just describe. All but 2 candidates attempted this question and 9 passed. The more informed focused on the limitations of e-learning such as access to computers, computer literacy and time for training (and testing) need to be included. The weaker candidates stated (in some cases) that e-learning is *“great. . . and cheap . . . and B&Q use it”*. As I have explained before, knowledge needs to be applied.

#### Question 7

This answer produced 4 distinctions, 1 merit and 4 passes from the 24 candidates.

But the question exposed poor examination technique that included:

- making suggestions about CPD for learning and development specialists rather than ICT staff
- how to initiate a TNA project
- making assertions that were not well-reasoned (as demanded by the question)

Methods could include knowledge sharing (train the trainer), lunchtime briefings, visiting other companies, updating via British Computer Society

#### Question 8

This was the second least popular question in Section B and produced the widest spread of marks. Centres I have visited comment on the poor reaction of putting numbers in front of CIPD students! Only 5 from 14 passed.

Variances can be both positive and negative and can arise from a range of contingencies: no-shows, staff sickness, inaccurate budgeting, emerging demands for training in response to business imperatives. Depending on organisation practices, amounts may be vired across budgets or the whole budget may be

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reappraised. Most answers assumed an over spend, but sometime under spending can be a feature. Generally budgeting processes are poorly understood.

#### **Question 9**

Initially this might be a learning style issue, and this was the focus of some answers. Candidates needed to recognise that the matter needs to be tackled before it becomes a problem issue. This was the most successfully answered question in Section B, with 12 of the 21 candidates passing. There were only 2 distinctions and 1 merit. Taking the individuals aside and giving them feedback on their behaviour is a tactic that might be used after something simple such as not looking at the person when the trainer is speaking. Sometimes, eye contact just encourages people to speak. Failure to justify was the main reason for failure here. Maybe candidates were running out of time?

#### **Question 10**

This was another popular question with a 56% pass rate. It dealt with the promotion of the training department and asks the candidates to either show why a roadshow would be useful, or challenge this and make alternative suggestions. Whatever option was decided, candidates needed to show how any action will develop a positive perception and this was generally well-handled, although this key issue was missed by the weaker candidates.

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#### **Conclusion**

I am disappointed to file such a negative report especially given the hard work that is done by centres to prepare candidates for the examination. Future candidates should consider more carefully whether they are ready to sit an M level examination. Turning up and not answering seven questions in Section B, having no knowledge of research or wider organisational practice or (unbelievably) being unable to write learning outcomes correctly simply wastes a candidate's money. Candidates do have the option to defer sitting the examination until they are ready: perhaps more should consider this route. I consider this to be professional practice as I wonder how many professionals present a training course without adequate preparation, how many ER staff turn up to an employment tribunal without sound knowledge of the facts of a case or how many undertake selection interviews inadequately prepared.

Future success in this paper will only be demonstrated by applying knowledge to the specific context of the question. Generalised statements and/or restatements of knowledge do not demonstrate the performance of an M level candidate.

The following comments are almost becoming a standing item in my reports. I don't know how to put advice any clearer.

I wish future candidates well as they prepare for this demanding examination. There is no substitute for hard work and application. Success in this paper will not be achieved by demonstrating lower standards than are acceptable on the Certificate in Training Practice. For specific improvement:

In Section A, build relevant detail and draw closer links from the given case scenario to the given context. Demonstrate confident application of knowledge of learning theory and use this to inform the training design.

In Section B, study the question more carefully before answering the question and answer the question, do not answer your own questions. Use the context of the question as a mini case study in the answer. Practise exam technique continuously before sitting the examination.

**Peter Cureton**  
Examiner