



Tools for Trainers

# How to design a personal plan

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## Introduction to personalized learning

In a Lifelong Learning System inspired to the learning personalization logic, *Personalization* can be applied at three levels:

- at MACRO LEVEL, the design of the learner's curriculum and the guidance;
- at MESO LEVEL, the planning and design of the course;
- at MICRO LEVEL, the didactic strategies and techniques.

The implementation of these three different levels of personalization involves as well three different professionals:

- LEARNING PERSONALIZATION TRAINERS (LPT)
- INSTRUCTIONAL DESIGNER
- TRAINER

Individualization	Personalization
<b>Same objectives for all learners</b>	Different objectives for each learner
<b>Applying of differenced didactic strategies to achieve the key competences</b>	Applying of differenced didactic strategies to promote the personal potentiality
<b>The educational curriculum is defined by the educational staff</b>	The learner actively participate to the construction of his own curriculum
<b>Valorisation of the cognitive dimension of the learner</b>	Valorisation of all dimensions of learner, not only the cognitive (emotional, social, life experience, etc.)
<b>Valorisation of previous knowledge and competencies, formal and non formal</b>	Valorisation of previous knowledge, competence, life and work skill, also informal
<b>Learner's self-direction as an accessory skill</b>	Learner's self direction as a fundamental skill
<b>Teacher has a key role</b>	Tutor has a key role

Table 1. Individualization vs. personalization

If we look for the term “personalize” in a dictionary, we find the following definition: “to take (a general remark or characterization) in a personal manner”. The term PERSONALIZATION is rich of meanings and still now there is not accordance among practitioners and researchers; most of them use it as a synonymous of “individualization”.

Furthermore, we need to consider the difference among the different cultural backgrounds of the European countries were, at a different levels, personalization approaches are applied in the adult education.

A personalized approach should include the following dimensions:

### **1. All the dimensions of the learner**

Personalization does not only include the cognitive dimension of the person. It has for goal his/her development, both *cognitively* and *emotionally*, as well as *social* and *citizen*.

### **2. Self-directed learning**

Personalization is based on the learner self-direction, which means: (a) that he has the ability to choose by himself the object and to determine the objectives of his learning (learning self-determination); and (b) that he can have a control over the terms and means of this learning (learning regulation: place, calendar, educational approach and material).

### **3. Learner as actor and co-producer of the learning process**

According to a personalized approach, the learner is seen as the actor of his learning and in this sense is associated with the decisions of the training organization.

### **4. The trainer as a facilitator of the learning process**

The role of the teacher/trainer is not to transmit contents, but to support the learner in the control of his learning.

Within this common definition it has been also possible to highlight different and similar aspects of personalization models, concepts, practices and to identify the following recurrent features:

- Involvement of the all dimensions of learner;

- Development of self directed learning process;
- Development of self regulated learning process;
- Co-design of the learning pathway and process;
- Development of self-evaluation process;
- Learning challenges instead of learning objectives;
- Learning pathway instead of instructional curriculum or training program;
- Achievable results are not predictable a priori.

## At which level can I apply a personalized approach?

We have identified three levels of personalization: **BASIC, MEDIUM, ADVANCED.**

### **BASIC**

At this level we can suppose that the personalization is referred to the best arrangement of:

- duration of the educational experience;
- educational materials;
- educational methods, according to the chosen paradigm (constructivism, behaviorism, cognitivism, complex,...);
- educational communication models (one to one, one to many, many to many) and styles (cooperative, collaborative, didactic, horizontal, hierarchic...);
- evaluation models, tools, strategies;
- educational environments;
- educational interaction: at a distance or in presence, one alone or in a small/medium/large group.

All of these elements are to be kept with the detected learning skill set, learning strategies, learning styles, learning attitudes. As well, we have to consider the best arrangement of contents, didactic units, curriculum, difficulty level, suggestions for deepening, in keeping with the detected learner's priorities, motivation, learning needs, learning request, previous knowledge, previous learning experiences, previous competences, potential development area.

## **MEDIUM**

At this level the **IDENTITY** and the **BIOGRAPHY** of the learner come into play next to the specific learning features recalled in the basic level (see the document [SAVE digital portfolio frame](#)).

Personalization is settled as a customized educational experience, supporting the self-realization of the learner, in which:

- meaningful biography traits are valorised for the solving of relevant problems, sharing solutions with peer learners;
- elements of his/hers previous learning experiences, competences and knowledge are recalled and re-structured in the new learning;
- resources brought by the learner are integrated within the pathway;
- learning effort is oriented towards an experience focused on themes and problems significantly connected to the real daily life.

## **ADVANCED**

At this level personalization is intended as:

1. a gradual process of gaining awareness about the owned learning skill and meta-cognitive competences;
2. a gradual process of acquiring autonomy in the capability of choice, and of the development and co-planning of new learning experiences.

At this advanced level the **ORGANIZATIONAL VARIABLES** appear particularly decisive, since a high level of flexibility is requested. This issue includes re-negotiation of learning challenges, curriculum, resources, tools, experiences, duration, courses, etc. The learner should have a good level of awareness and autonomy for the use of material and resources, as well as for the interaction with the actors of the learning experiences; the assessment process can influence the development of the learning experience itself.

It can happen that the learner realizes that he/she need to include in the learning pathway something that was excluded at the beginning, that the chosen challenges are too much high or low, that the necessary time is more or less than

the duration foreseen. Then, in a personalized perspective, the flexibility itself can vary from a minimum to a maximum, always according to the rules defined in a preliminary formative pact and respecting a pedagogic rigor.

PERSONALIZATION LEVELS			
Level	GUIDANCE	INSTRUCTIONAL DESIGN	TRAINER'S PRACTICE
<b>What</b>	Design of the learner's curriculum	Planning and designing of adult courses	Didactic strategies and tactics
<b>Who</b>	LPT	INSTRUCTIONAL DESIGNER	TRAINERS of adult and elderly learners

**Table 2. Personalization levels**



The learner needs a counselling service to be oriented, introduced in and guided through a personal learning pathway where will find personalized courses and trainers/teachers adopting learning personalization strategies.

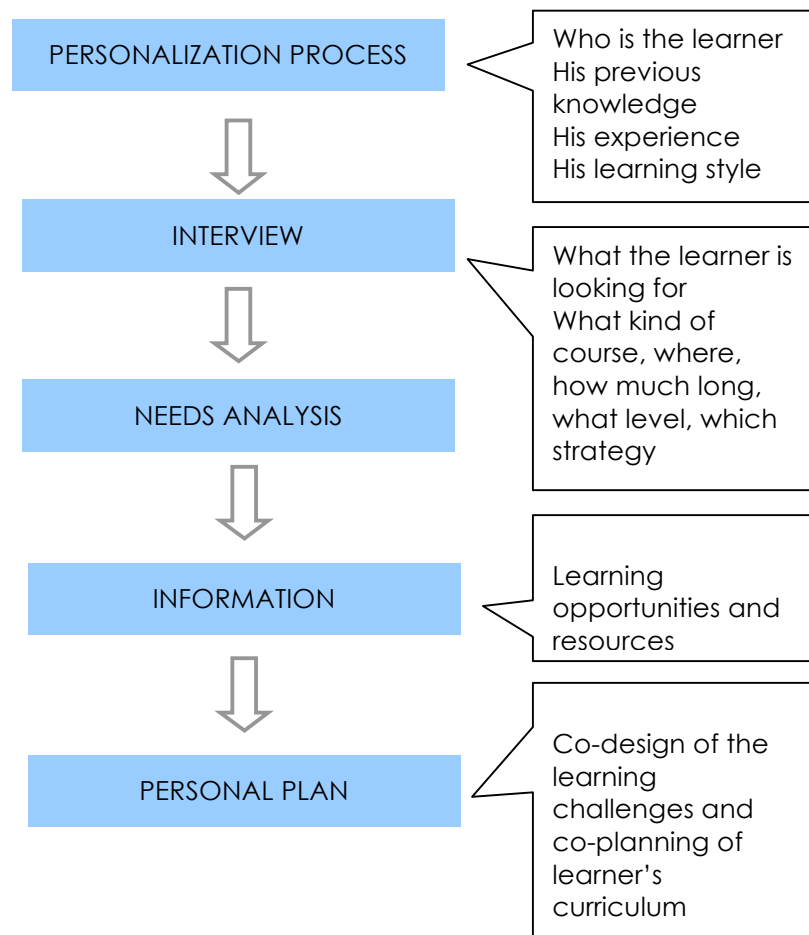
LEADLAB Model has designed an *ideal framework*, highlighting the core and decisive elements in order to implement an adult educational system authentically inspired to personalization.

From an organizational point of view, within the described model, it is then requested also the interaction, direct o indirect, of three professional figures:

- **LEARNING PERSONALIZATION TRAINER (LPT):** co-plans, interacting with adult learners, personalized learning pathways, guides, motivates, empowers the learning process;
- **INSTRUCTIONAL DESIGNER (ID):** designs macro instructional processes, flexible curricula and courses structures (modules, units, activities, contents, etc.) oriented to adult learning requirements;
- **TRAINER/TEACHER:** expert of contents, applies learning personalization method and strategies within the single and specific courses.

Within the range of possible personalization levels (basic, medium, advanced) the personalization process involves both the personalization of the whole learning pathway and the personalization of each single course combining the personalized curriculum, where the learner will interact with trainers/teachers adopting learning personalization strategies.

LEARNING PERSONALIZATION TRAINER	LEARNER
	



**Figure 1. Personalization process**

## What does a Trainers need in order to personalize a learning pathway?

Trainers are involved in the direct interaction with learners within one or more courses of the learning pathway co-designed by the LPT and the learner. To the trainers is requested to *carry out the course applying personalization strategies*.

Following are presented some practical instructions and examples in order to guide trainers applying at a *high level* the learning personalization:

- To know the learner (see the document [SAVE digital portfolio frame](#))
- To apply personalization strategies
- To improve self evaluation culture
- To change some consolidated teaching routines
- To improve the meta-cognitive and self learning skill set of the learner and his/hers autonomy in the learning process.

## How to support the self-evaluation processes?

The evaluation process is a decisive and integral part of the LEADLAB learning personalization model. It reflects and respects all the highlighted dimensions. Consequently the evaluation will involve:

- **ALL THE DIMENSIONS OF THE LEARNER:** an evaluation inspired to the personalization approach *does not include exclusively the cognitive dimension of the person*. It has for goal his/her development, both cognitively and emotionally, as well as social and citizen.
- **SELF-DIRECTED LEARNING:** personalization is based on the learner self-direction, which means that the evaluation will support the *autonomous choice of the objectives of learning* (learning self-determination) and will increase the control over the terms and means of this learning (learning regulation: place, calendar, educational approach and material)
- **LEARNER AS ACTOR AND CO-PRODUCER OF THE LEARNING PROCESS** as well of the evaluation of learning process;

- **THE TRAINER AS A FACILITATOR OF THE LEARNING PROCESS:** the role of the teacher or of the trainer is not only to mark, but to support the learner in evaluation of his learning.

The self-evaluation here is intended as a process gradually guiding to empowerment of an advanced meta-cognitive competence allowing the learner to acquire awareness about the knowledge and competences owned, the potential development area.

Self-evaluation is intended as *a strategy for an active and aware involvement of the learner in the co-design of the learning pathway and in the learning experience itself*. The evaluation strategy, tools and steps are indeed co-designed in the formative pact.

The evaluation process, such as the learning process, can be implemented from a minimum to a maximum of personalization grade.

For example, in a preliminary diagnostic evaluation step, to be carried out before the learning pathway, *learner can be guided to co-diagnose the potential development area:*

- at a **BASIC LEVEL** the learner could be guided to recall and become aware of the representative elements of his/hers biography, of his/hers previous learning experiences, competences and knowledge better linked with the new learning experience in the perspective of the co-planning of the future learning experience;
- at a **MEDIUM LEVEL** the learner could be supported to identify by him/herself the representative elements of the his/hers biography in the perspective of the co-planning of the future learning experience;
- at an **ADVANCED LEVEL** learner could be assigned to realize a self directed analysis of his/hers biography in order to identify by him/herself the representative elements in the perspective of the co-planning of the future learning experience.

The trainer can valorise again the self-biography result in order to guide, in the preliminary diagnostic evaluation step, the analysis and self-reflection of the

learner about the starting point of a new learning experience and the possible and achievable learning challenges.

At an advanced level the analysis of the biography could be realized in-group among peers instead of in a one to one relation with the trainer.

The formative self-evaluation step asks again for an active involvement of the learner. Operative tasks and reflection in action allow the adult learner to check learning results, to experience additional or alternative learning strategies and to verify if the learning challenges can be reached or need to be re-settled. The on going self-evaluation supports motivation and self-realization. It can happen that motivation decreases during the learning experience, for example if the co-settled aims are too difficult or too easy to be reached.

## What is the role of the trainer in a self-evaluation approach?

Trainers who want to apply a personalised evaluation approach should **SUPPORT LEARNER** in the analysis of the achieved results, highlighting the progresses done, enhancing the awareness about the improvement in the adoption of learning strategies.

To support the formative self-evaluation activity, trainer can invite learner to register all the relevant events of learning in a **DIARY**. This story telling can be used to verbalise the strategy of learning, to describe trip and tricks used to memorize concepts, rules. A learning diary can be precious also in the final step of the evaluation to re-read all the learning process and to find out the decisive phases. To write and read is useful to acquire consciousness and to fix experiences. Re-reading the diary helps learner to compare the learning approach adopted at the beginning and the new strategy of learning acquired or perfected meanwhile; to reflect on how the way of learning is changed; to compare the achieved learning results with the starting point.

The self-evaluation can be enriched through a **PEER-TO-PEER COMPARISON**. Trainer can organise a workshop, inviting learners to show and compare the achieved results with other people. A group discussion, guided by the trainer, can help learners to identify ideas in order to perfect the achieved results using the other products as

model or as stimulus or as an example. The group discussion works as a peer self evaluation and represents the basis in order to repeat a task an perfect the realized product

The peer-to-peer self-evaluation experience can be enriched with a **BENCHMARKING ACTIVITY** among other groups. Inviting the learner to compare the achieved results with the initial expectations, through a task analysis trainer can support the learner awareness about what is missing, what is still requested, which task has been correctly achieved and which one not, to better focus on key contents or relevant activities. To conduct this analysis trainer can adopt the **SWOT** strategy.

Finally, at the end of the learning experience, trainers guide learner to re-read all the learning experience, comparing the achieved results with the co-settled challenges, helping learner to identify also unexpected achieved results.

The final evaluation is the again a diagnostic evaluation step, to co-diagnose the new potential development area and to decide about next learning experiences.

The expected result of such process of self evaluation, at an high level of personalization is that the adult and elderly learners will empower the learning needs analysis capability allowing them, individually or in a group, to set:

- learning challenges;
- curriculum;
- resources;
- tools;
- experiences;
- duration;
- courses, etc.

## How to build an effective interaction?

In the perspective of a personalized learning experience the educational interactions are oriented towards the expression of the potentialities of the learner and to the progressive development of his/hers learning autonomy.

The educational interactions sustain the self-realization of the learner. Teaching and learning strategies, consequently, ought to carefully respect:

- learner's psychological profile;
- learner's culture;
- learner's biography;
- learner's priorities.

As well, educational interaction should:

- include the biographic method;
- focus the intervention on a perspective o themes and problems, instead of contents and disciplines;
- adopt a situational approach;
- focus the intervention on concrete tasks;
- promote reflection in action;
- valorise and supports the autonomy of the learner;
- valorise the masterly instinct of the learner;
- preserve a flexibility margin in the development of the educational experience.

The educational interaction is aimed to guide the learners to find, analyse, select, choose, use for their specific aims the disposable resources, both in the formal contexts and in the informal contexts, within or outside the learning environment where a specific course is carried out.

Educational interaction should encourage inductive processes of knowledge, explorative and research attitude as well as self-orientation. Trainer should offer assiduous and continuous interactions, scaffolding and well-timed feedback to the learner, motivating him/her through the construction of an encouraging space. A didactic or directive interaction, in the LEADLAB MODEL, is minimized.

The educational interaction is oriented to animate the learning processes, to encourage the contextualization and the practical use of the acquired knowledge and competences within the real context of action of the learners.

Since a learning experience, even if personalised or self directed, it is not necessary a one alone experience, it is fundamental a custom-made training interaction that schedules the development of valuable competencies, particularly about social support: emotional, affective and motivational scaffolding, safeguard of a reciprocal trust climate, stimulating collaborative activities, analysis of interpersonal relations, conflict resolution. Then in a collective interaction tutorship and leadership are requested to be dynamic and not fixed *ex-ante*. Within this group the expert or the trainer interact as a *primus inter pares* participating as an **ANIMATOR** of the learning community. Learners are encouraged to identify, time-by-time, who within the learning group is an expert *de facto* according to the specific given tasks.

## What competences the learners develops in a personalized approach?

Personalized learning foresees the progressive acquirement of awareness of the **META-COGNITIVE SKILLS** and of **SELF-LEARNING SKILLS**. Then a further group of competences required to the learner and to be implemented and exploited by the trainers are:

- *Reflection*: includes the reflective practices applied to the actions in the real contexts, generating new knowledge and new competences. Reflection is the common denominator of core components of the self-learning process such as the acquiring of awareness, the autobiography, the observation and the self-evaluation.
- *Self-realization*: includes all the emotional and affective elements of the self-learning experience. The self-realization represents indeed the aim where all the motivational energies are addressed, inducing the strength and the constancy in the learning.
- *Self-direction*: refers to all the components of coordination and management of the learning experience, through the use of specific learning methods and strategies. It implies a self-awareness of the meta-cognitive competences.
- *Autonomy*: refers to the mastery and maturity as concern the task of self-learning.

The **Reflection** is the starting point of this process that is characterized by the following stages:

- **ACQUIREMENT OF AWARENESS:** there are meaningful themes and problems able to activate in the adult the perception of learning needs and to stimulate the search of pathway that allow to meet them;
- **AUTOBIOGRAPHY:** it represents the matrix where to install the new learning experience, it is up to the learner to identify the representative elements of his/hers previous experience and knowledge and competences, useful for the new learning experience;
- **OBSERVATION:** it is a key element of the reflection attitude in order detect strength and weakness and to became aware of the learning needs;
- **SELF-EVALUATION:** it is a self-regulation process allowing the learner to monitor the development of the learning experience and verify the learning results.

The **Self-realization** is the engine supporting the constant development of the self-learning process, it includes:

- **SELF-MOTIVATION** as the necessary attitude to afford the inconstant fluctuation of the learning behaviour, thanks to the volition, curiosity and intentionality;
- **PERSONAL RESPONSIBILITY** as the capability of the learner to take on the consequences of his/hers choices and to maintain a taken commitment.

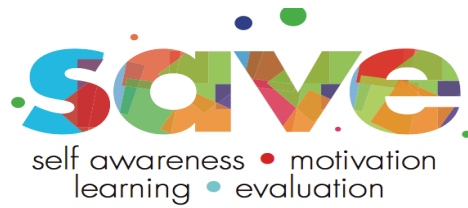
The **Self-direction** implicates:

- **SELF-SETTING** of the aims to be achieved;
- **ATTENTION AND CONCENTRATION**, as the attitude of the learner to effectively address his/hers tensions, emotions and efforts to the achievement of the learning aims, in an ergonomic and strategic key of adaptation to the continuous changing of environments and contexts;
- **SELF-PLANNING**, as the necessary attitude to organize the learning experience as concern the timing as well as the choice of the learning strategies;

- **SELF-MONITORING AND COMPARISON** refer to the attitude of the learner to evaluate the quality of the learning experience and to identify the better learning practices and solution, also referring to the experiences of other learners.

**Autonomy** is the final step of the process including the acquirement of the self-studying mastery and the complete maturity about the management of the self-learning process.

At the same time it is the new starting point of a new learning experience as the result of a **SELF-TRANSFORMATION PROCESS**: the new awareness and acquired autonomy represent again a implementation and a transformation of the previous perspective. It implicates a new disorienting dilemma generating a new development need.



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