



Pearson
BTEC



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Pearson BTEC

Level 2 Technical Occupational Entry for

Gym Instructors (Diploma)

Specification

First teaching from September 2025

First certification from 2026

Issue 1

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Pearson BTEC Level 2 Technical Occupational Entry for Gym Instructors (Diploma)

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BTEC Technical Occupational Entry qualification

First registration September 2025

About Pearson

We are the world's leading learning company operating in countries all around the world. We provide content, assessment and digital services to students, educational institutions, employers, governments and other partners globally. We are committed to helping equip students with the skills they need to enhance their employability prospects and to succeed in the changing world of work. We believe that wherever learning flourishes so do people.

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Welcome

With a track record built over 30 years of student success, BTEC qualifications are widely recognised and respected. They provide progression to the workplace either directly or via study at higher levels. Recent data has shown that 1 in 5 adults of working age in the UK has a BTEC qualification.

Why choose BTEC Level 2 Technical Qualifications?

BTEC Level 2 Technical Qualifications enable students to develop a purposeful and coherent combination of knowledge, skills and behaviours to confidently enter or progress into employment at entry level in occupations that are recognised and demanded by employers.

The qualifications, which are based on the occupational standards published by the Institute for Apprenticeships and Technical Education (IFATE), embody a fundamentally learner-centred approach to the curriculum, with a flexible, unit-based structure and an approach to learning and assessment that:

- provides students with meaningful and occupationally relevant learning experiences.
- engages and motivates students to achieve as assessments can be focused on individual student needs and can be achieved as they progress through the qualifications.
- promotes self-directed learning through the clarity and transparency of the standards to be achieved.
- makes the qualifications accessible to a wider range of students, including part time and adult students.

In developing these qualifications, we have collaborated with employers to ensure that the qualifications meet the current and emerging needs of industry. We have also worked with colleges and training providers to ensure that the qualifications meet their needs and those of their students.

We are providing a range of support to ensure that students and their tutors have the best possible experience during their course. Further information is provided on the qualification pages of our website.

A word to students

These qualifications will require commitment and hard work. You will have to complete the learning for the required range of units, be organised and complete your assessments, which may include practical work-based activities, projects and vocational assignments. But you can feel proud to achieve a BTEC Level 2 Technical Qualification as you can be confident in your readiness to advance your career in your chosen occupation.

Good luck, and we hope you enjoy your course.

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1 Introducing the qualification

What are Level 2 Technical Occupational Entry Qualifications?

Level 2 Technical Occupational Entry Qualifications are qualifications that are at level 2 on the Regulated Qualifications Framework (RQF) and are designed to deliver the knowledge, skills and behaviours needed to enter the workplace. They can be delivered through a combination of classroom and work-based learning and assessment.

These qualifications are based on occupational standards designed by employers and published by the Institute for Apprenticeships and Technical Education (IfATE), who also approve the qualifications. IfATE has specified different categories under which Level 2 Technical Qualifications can be approved based on their scope and purpose. Detailed information about these categories can be found on IfATE's website.

Qualification purpose

The Pearson BTEC Level 2 Technical Occupational Entry for Gym Instructors (Diploma) enables students to develop a purposeful combination of knowledge, skills and behaviours to enter employment as a gym instructor at entry level and provides a strong foundation for them to achieve full occupational competence with further training and development in the workplace.

The qualification is designed to meet the needs of students (16+) and provides progression to employment in an occupation that is recognised and demanded by employers.

The qualification will:

- develop students' ability and confidence to apply the knowledge, skills and behaviours in carrying out the relevant occupational duties and functions to meet entry level competence.
- develop transferable skills, and professional behaviours/attributes such as communication, teamwork, and self-management that are essential to personal effectiveness in the stated occupation.
- develop knowledge and understanding of best practices and core values such as health and safety, professional conduct, and inclusivity that are important for regulatory compliance/ meeting professional requirements/working safely/sustainable operations/inclusion and diversity etc. in the stated occupation or industry/sector.
- align with the following Professional Standards (e.g., CIMPSA)

- provide employers with reliable evidence of students' attainment against the Leisure Team Member occupational standard and their readiness to enter employment in the related occupation at entry level.

The qualification can be taken on a part-time or full-time basis to meet the needs of older 16 + students.

Employer engagement and validation

In developing the Pearson BTEC Level 2 Technical Occupational Entry for Gym Instructors (Diploma), we have worked closely with a dedicated panel of employers from a range of different types of organisations, who have:

- validated the demand for the qualification and confirmed that it is occupationally relevant and meets the current and emerging needs of industry.
- confirmed that students will have an appropriate combination of knowledge, skills and behaviours relevant to the occupational standard that attests to their readiness to enter into employment in the related occupation at an entry level.

Progression opportunities

Students who achieve the Pearson BTEC Level 2 Technical Occupational Entry for Gym Instructors (Diploma) will most likely progress into specific employment at entry level. However, students may also progress to a related Apprenticeship for Personal Trainer at Level 3.

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2 Qualification summary and key information

Qualification title	Pearson BTEC Level 2 Technical Occupational Entry for Gym Instructors (Diploma)
Qualification Number (QN)	610/4255/9
Regulation start date	28/05/2024
Operational start date	01/09/2025
Approved age ranges	16–18, 18+, 19+
Total qualification time (TQT)	414 hours.
Guided learning hours (GLH)	360
Assessment	Internal assessment demonstrating evidence of entry level competence. Required methods of assessment and evidence will be described in the unit. Please see <i>Section 5 Assessment requirements</i> .
Grading information	The qualification and units are graded Pass/Merit/Distinction. Students must pass all units to achieve a grade.
Entry requirements	No prior knowledge, understanding, skills or qualifications are required before students register for this qualification.
Funding	This qualification is eligible for 16+ funding as a Technical Occupational Entry qualification. Information about funding can be found on the Find a learning aim database .

3 Qualification structure

Pearson BTEC Level 2 Technical Occupational Entry for Gym Instructors (Diploma)

The requirements outlined in the table below must be met for Pearson to award the qualification.

Unit number	Mandatory units	Level	Guided learning hours
1	Working in the Sport and Active Leisure Industry	2	120
2	Exercise Instructor Knowledge and Development	2	60
3	Preparing Clients for a Gym-based Exercise Programme	2	60
4	Working as a Gym Instructor	2	120

4 Delivery

Occupational entry level competence

This qualification is designed to be delivered in post-16 learning contexts. Delivery should focus on a student's ability to use knowledge, skills and appropriate behaviours in the workplace. Links with the workplace should be encouraged throughout.

Work placement

Work placement is not essential for completion of this qualification. Nevertheless, students are encouraged to form links with the workplace. This can be through work experience with employers, or links between workplaces and their place of study. In assessment, simulation of the work environment is permitted.

Transferable skills

Recent future skills reports have highlighted the growing importance of transferable skills for students to succeed in their careers and lives in this fast-changing world.

Following research and consultation with FE educators and higher education institutions, Pearson has developed a Transferable Skills Framework to facilitate and guide the development of transferable skills through this qualification. The Framework has four broad skill areas, each with a cluster of skills as shown below:

1. **Managing Yourself:** (1) Taking Personal Responsibility; (2) Personal Strengths & Resilience; (3) Career Orientation Planning; (4) Personal Goal Setting
2. **Effective Learning:** (1) Managing Own Learning; (2) Continuous Learning; (3) Secondary Research Skills (4) Primary Research Skills
3. **Inter-personal Skills:** (1) Written Communications; (2) Verbal and Non-verbal Communications; (3) Teamwork; (4) Cultural and Social Intelligence
4. **Solving Problems:** (1) Critical Thinking (2) Problem Solving; (3) Creativity and Innovation.

Each transferable skill has a set of descriptors that outline what achievement of the skill looks like in practice. Each unit in the qualification will show whether a transferable skill has been:

1. fully embedded through the design of the teaching and learning content and assessment of the unit. Skills that are embedded are 'naturally occurring' in that they are inherent to the unit content and doesn't require extension activities to deliver.
2. signposted as an opportunity for delivery and development and would require extension activities to deliver.

Units will show a summary of the transferable skills that have been embedded or signposted and *Appendix 1* shows the descriptors for each skill across all the skill clusters. More information on the framework, its design and relevance for student progression is available in the *BTEC Transferable Skills Guide for Teachers*. Resources and guidance to support teachers in the delivery and development of these skills will be available in the Delivery Guide for this qualification and through our training offer.

Sustainability education

To help students develop sustainability skills, practices and mindset, we have designed content in this qualification, aligned to the UNESCO Sustainable Development Goals (17 SDGs), that are relevant and appropriate to the sector. The SDGs are the most common point of reference for content that addresses sustainability education and provides a useful and pragmatic way of presenting this content.

Sustainability knowledge and understanding may be included in the teaching and learning content but not directly assessed. Alternatively, it could be assessed – the approach chosen for each unit is based on the relevance of knowledge and understanding to the purpose and scope of the unit.

5 Assessment requirements

Language of assessment

Students must use English only during the assessment of this qualification.

A student taking the qualification may be assessed in British Sign Language where it is permitted for the purpose of reasonable adjustment.

Further information on the use of language in qualifications is available in our Use of languages in qualifications policy, available on our website, [qualifications.pearson.com](https://www.pearson.com/qualifications).

Internal assessment

Internally assessed units are subject to standards verification. This means that centres set and mark the final summative assessment for each unit, drawing on mandatory evidence requirements and support that Pearson provides.

To pass each internally assessed unit, students must:

- achieve all the specified learning outcomes.
- satisfy all the assessment criteria by providing sufficient and valid evidence for each criterion.
- meet any prescribed evidence requirements for a unit i.e., units may mandate practical demonstration of skills in a workplace or simulated environment.
- prove that the evidence is the own.

Centres must ensure:

- assessment is carried out by tutors with relevant expertise in both the occupational area and assessment. For the occupational area, this can be evidenced by a relevant qualification or current (within three years) occupational experience that is at an equivalent level or higher than this qualification. Assessment expertise can be evidenced by qualification in teaching or assessing and/or internal quality assurance or current (within three years) experience of assessing or internal verification.
- internal verification systems are in place to ensure the quality and authenticity of students' work, as well as the accuracy and consistency of assessment. These must include processes for detecting and reporting student malpractice such as plagiarism (including AI misuse), copying and collusion.

Students who do not successfully pass an assessment are allowed to resubmit evidence for the assessment. If a student has still not achieved the targeted pass criteria following the resubmission of improved evidence for an assignment, the Lead Internal Verifier may

authorise, under exceptional circumstances, one retake opportunity to meet the required pass criteria. The retake assignment must be based on a different content theme, sector challenge/issue or context brief as relevant. The deadline for submission of the retake must fall within the same academic year.

Grading of the qualification

Achievement in the qualification requires a demonstration of depth of study in each unit, assured acquisition of the practical skills required for employment in the specific sector and successful development of transferable skills.

Units are assessed using a grading scale of Distinction, Merit, Pass and Unclassified. All units in the qualification contribute proportionately to the overall qualification grade.

The qualification is graded using a scale of PP to DD. Please see *Section 11 Understanding the qualification grade* for more details.

The relationship between qualification grading scales and unit grades will be subject to regular review as part of Pearson's standards monitoring processes on the basis of student performance and in consultation with key users of the qualification.

Levels of control in internal assessment

Task setting

Centres are able to design tasks that address the assessment criteria within a unit. Restrictions on task setting such as mandatory forms of evidence requirement, or restrictions surrounding the context of assessment will be stated within the qualification unit and any accompanying Authorised Assignment Brief(s). Although task setting is characterised as low control, Pearson applies quality assurance methodology to ensure that centre systems are in place to develop and assure high quality assessments for students. The Authorised Assignment Brief serves as a model for the expected presentation of a unit assessment. Further guidance and references are provided in *Section 9 Quality assurance of centres*.

Task taking

Centres must be able to authenticate the student response to the assessment. Supervision may not always be appropriate, if for example a student is gathering evidence for an assessment that is then prepared in a classroom environment. However, centres must be assured that students produce their own response to assessment criteria. This may require supervision of students in writing up outcomes to ensure they do not use text generative AI software.

Task marking

Centre assessors and tutors will mark the student assessment response, using Pearson BTEC assessment/grading criteria and the guidance we provide in the specification and

surrounding process, and training we provide supporting our quality assurance process. Pearson will quality assure the processes that centres use to ensure the standard of marking outcome. We operate a risk-based quality assurance process ensuring that new centres, centres with large cohorts and centres with other risk factors get the support they need to ensure students achieve the outcome they have worked for.

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Mandatory evidence for assessment

Units will include information on the mandated types of evidence that students must produce to achieve a unit. These evidence types are stipulated in occupational standards and have been confirmed by employers.

Students must submit evidence in mandatory forms where indicated in the unit and assessment. Students can submit their remaining evidence in one or more optional formats.

Tutors must ensure that collated tasks/assignments enable students to generate the evidence needed against the assessment criterion standard.

Authorised Assessment Briefs

Each unit will have Authorised Assessment Briefs (AABs). The AABs are there to provide an example of what the assessment could look like in terms of the feel, level of demand and integration of mandated evidence required of the assessment. Units will include information about where authorised assignment briefs can be adapted, and what features may need to be retained in centre devised assessments. Centres are reminded that the AABs form a basis of standardisation of task setting within the Pearson quality assurance process.

A copy of each of these assessments can be downloaded from the qualification page on our website.

6 Centre recognition and approval

Centres must have approval prior to delivering any of the units in this qualification.

Centres that have not previously offered BTEC qualifications need to apply for, and be granted, centre recognition as part of the process for approval to offer individual qualifications.

Existing centres will be given 'automatic approval' for a new qualification if they are already approved for a qualification that is being replaced by a new qualification and the conditions for automatic approval are met.

Guidance on seeking approval to deliver BTEC qualifications is given on our website.

Approvals agreement

All centres are required to enter into an approval agreement with Pearson, in which the head of centre or principal agrees to meet all the requirements of the qualification specification and to comply with the policies, procedures, codes of practice and regulations of Pearson and relevant regulatory bodies. If centres do not comply with the agreement, this could result in the suspension of certification or withdrawal of centre or qualification approval.

Centre resource requirements

As part of the approval process, centres must make sure that the resource requirements below are in place before offering the qualification:

- appropriate physical resources (for example gym facilities and equipment, IT, learning materials, teaching rooms) to support the delivery and assessment of the qualification.
- suitable staff for delivering and assessing the qualification (see *Section 5 Assessment requirements*)
- systems to ensure continuing professional development (CPD) for staff delivering and assessing the qualification.
- health and safety policies that relate to the use of equipment by students.
- internal verification systems and procedures (see *Section 5 Assessment requirements*)
- any unit-specific resources stated in individual units.

7 Access to qualifications

Access to qualifications for students with disabilities or specific needs

Equality and fairness are central to our work. Our Equality, diversity and inclusion policy requires all students to have equal opportunity to access our qualifications and assessments, and that our qualifications are awarded in a way that is fair to every student.

We are committed to making sure that:

- students with a protected characteristic (as defined by the Equality Act 2010) are not, when they are taking one of our qualifications, disadvantaged in comparison to students who do not share that characteristic.
- all students achieve the recognition they deserve from their qualification and that this achievement can be compared fairly to the achievement of their peers.

For students with disabilities and specific needs, the assessment of their potential to achieve the qualification must identify, where appropriate, the support that will be made available to them during delivery and assessment of the qualification.

Centres must deliver the qualification in accordance with current equality legislation. For full details of the Equality Act 2010, please visit www.legislation.gov.uk

Reasonable adjustments and special consideration

Centres are permitted to make adjustments to assessment to take account of the needs of individual students. Any reasonable adjustment must reflect the normal learning or working practice of a student in a centre or a student working in the occupational area.

Centres cannot apply their own special consideration – applications for special consideration must be made to Pearson and can be made on a case-by-case basis only.

Centres must follow the guidance in the Pearson document *Guidance for reasonable adjustments and special consideration in vocational internally assessed units*.

8 Recognising prior learning and achievement

Recognition of Prior Learning (RPL) considers whether a student can demonstrate that they can meet the assessment requirements for a unit through knowledge, understanding or skills they already possess and so do not need to develop through a course of learning. If RPL is used, a student must be assessed again against assessment criteria, and their evidence must meet any mandatory evidence requirements in units.

Pearson encourages centres to recognise students' previous achievements and experiences in and outside the workplace, as well as in the classroom. RPL provides a route for the recognition of the achievements resulting from continuous learning.

RPL enables recognition of achievement from a range of activities using any valid assessment methodology. If the assessment requirements of a given unit or qualification have been met, the use of RPL is acceptable for accrediting a unit, units or a whole qualification. Evidence of learning must be valid, authentic, reliable, current, and sufficient.

Further guidance is available in our policy document *Recognition of prior learning policy and process*, available on our website.

9 Quality assurance of centres

For the qualification in this specification, the Pearson quality assurance model will consist of the following processes.

Centres will receive at least one visit from our Standards Verifier, followed by ongoing support and development. This may result in more visits or remote support, as required to complete standards verification. The exact frequency and duration of Standards Verifier visits/remote sampling will reflect the level of risk associated with a programme, taking account of the:

- number of assessment sites
- number and throughput of students
- number and turnover of assessors
- number and turnover of internal verifiers
- amount of previous experience of delivery.

Following registration, centres will be given further quality assurance and sampling guidance.

For further details, please see the work-based learning quality assurance handbooks, available in the support section of our website:

- Pearson Work-based Learning Centre Guide to Quality Assurance
- Pearson Work-based Learning Delivery Guidance & Quality Assurance Requirements.
- Support is also available on our work based learning quality assurance webpages [Quality Assurance - Work-based Learning \(WBL\) | Pearson qualifications](#)

10 Units

This section of the specification contains the units that form the assessment for the qualification.

For explanation of the terms within the units, please refer to *Section 15 Glossary*.

It is compulsory for students to meet the learning outcomes and the assessment criteria to achieve a Pass. Content is compulsory unless it is provided as an example and is therefore marked 'e.g.'. All compulsory content must be delivered, but assessments may not cover all content.

Where legislation is included in delivery and assessment, centres must ensure that it is current and up to date.

Unit 1: Working in the Sport and Active Leisure Industry

Level:	2
Unit type:	Mandatory
Assessment type:	Internal
Guided learning hours:	120

Unit in brief

In this unit, students will explore how people access sport and physical activity, the ways in which participating can benefit them and the community but also the factors that might prevent them taking part.

Unit introduction

To a greater or lesser extent sport and physical activity are a part of many people's lives from school onward. The experiences they have will shape the way they think about sport and physical activity and may well influence their ongoing attitudes to participation. As we age there may be more barriers that prevent or hinder participation, however the importance of regular exercise at all stages of life and our knowledge and understanding of the vital role that sport and physical activity play in maintaining a healthy lifestyle have never been greater.

In this unit, you will explore the various ways that people access sport and physical activity from school onward. You will look at the barriers that might prevent or make it difficult for people to participate, as well as investigating the many and varied benefits of taking part in physical activity, whatever age you are.

You will gain an understanding and appreciation of the importance of personal skills and professional behaviours for those who are involved in sport and active leisure at any level, and the impact this can have on people's participation and enjoyment.

You will explore the various policies and procedures that govern sport and physical activity, understanding the need for legislation, regulation, policies and procedures in order to keep everyone safe, whatever activity they undertake. You will also consider why it's important to provide sport and physical activity opportunities for all, regardless of ability, disability, experience or needs, and the steps that can be taken to achieve this.

This unit will act as a good first step on the ladder for a wide range of jobs in the active leisure industry. It will prepare you for more targeted study at the same level, for example as a gym instructor, recreation assistant or sports leader, or to move on to a higher-level qualification or apprenticeship.

Learning outcomes and assessment criteria

To pass this unit, students need to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Pass	Merit	Distinction
Learning outcome 1: Explore the ways in which people participate in sport and physical activity		
1.P1 Outline ways in which people access sport and physical activity.	1.M1 Describe ways people access sport and physical activity, including factors that influence their participation.	1.D1 Evaluate ways people access sport and physical activity and factors that influence their participation.
Learning aim 2: Understand the benefits of and barriers to participating in sport and physical activity		
2.P2 Identify key benefits to an individual, of regularly participating in sport or physical activity.	2.M2 Explain physical, psychological, social and economic benefits for individuals and community groups from taking part in regular sport or physical activity.	2.D2 Evaluate strategies that could be used to maximise benefits and reduce barriers for community participation in regular sport or physical activity.
2.P3 Identify barriers to participation in regular sport or physical activity and suggest methods to overcome each barrier.	2.M3 Explain barriers to participation in regular sport and physical activity and methods to overcome these barriers.	
Learning outcome 3: Explore personal skills and professional behaviours for working in the sport and active leisure industry		
3.P4 Outline how personal skills and professional behaviours builds positive relationships with customers in the sport and active leisure industry.	3.M4 Explain the effects of personal skills and professional behaviours on relationships with external stakeholders and internal colleagues.	3.D2 Evaluate the effects of personal skills and professional behaviours on building relationships with external and internal stakeholders.

Learning outcome 4: Explore methods to carry out safe and legal working practices in the sport and active leisure industry

4.P5 Identify national guidelines, legislation and policies that are relevant to working in the sport and active industry.	4.M5 Explain the use of relevant national guidelines, legislation and policies, for an identified job role in the sport and active leisure industry.	4.D3 Analyse the use of relevant national guidelines, legislation and policies for an identified job role.
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Learning outcome 5: Understand the importance of inclusivity in the sport and active leisure industry

5.P6 Identify different types of activity that can be provided, to meet a range of community needs.	5.M6 Explain methods that can be used to provide inclusive sport and physical activity for a local community.	5.D4 Evaluate methods that can be used to provide inclusive sport and physical activity for a local community.
5.P7 Outline ways in which sport and physical activity can be inclusive for everyone in the community.		

Unit content

What needs to be learned

Learning outcome 1: Explore the ways people participate in sport and physical activity

1A Access to sport and physical activity

- Impact of age on sport and physical activity participation
- Impact of stage of life on sport and physical activity participation e.g., school leaver, young family, working, retirement.
- School:
 - physical education – activities carried out during lesson time that follow the National Curriculum
 - extracurricular – before/after school, lunchtime, holidays, e.g., specialist sports offer, competitive (inter/intra school), participative, non-traditional, e.g., trampolining, yoga.
- Community sport:
 - coaching, skills development, competitive
 - recreational, participative, just for fun
 - physical recreation – activities carried out during leisure time for enjoyment, e.g., formally as part of club, informally, e.g. walking, running, cycling with friends or family
 - outdoor activities – activities carried out outdoors (or in recreation areas) that are adventurous, e.g., rock climbing, mountain biking, sailing, skiing.
 - gyms, e.g., public, private, workplace based.
- Other environments – home, park, e.g., individually, formally as part of a group (e.g., boot camp), online subscriptions (e.g. Les Mills, Peloton), gym, sports centre.

1B Explore factors that influence participation in sport and activity

- Impact of culture and customs on sport and physical activity participation:
 - role models
 - cultural traditions
 - local heritage and traditional community activities e.g., shinty, hurling, fell running, hill walking.
 - peer influence e.g., family, friends, colleagues
 - media influence

What needs to be learned

- influence of local community and environment on sport and physical activity opportunities and prevalence, e.g., water sports more likely on the coast and/or near a river
- school opportunities feeding into community opportunities, e.g., if local schools are 'rugby schools' then more likely to be opportunities to play rugby in the community, increased number of local rugby teams, feeding interest and player numbers etc.
- Action that may need to be taken to account for these factors:
 - same sex provision
 - provision of adapted activities
 - provision of opportunities that take account of the available environment e.g., water sports.
 - provision of opportunities that take account of local heritage and tradition e.g., Irish dancing.
 - pricing structure that enables groups, families, households etc to access cheaper rates when participating together.

1C Know the local customer base

- Structure of the local community
 - numbers, age groups, available finances, employment opportunities
- Needs and wants of the local community.
 - location of opportunities
 - cost of opportunities
 - type of activities on offer
 - activities that meet an identified need, e.g. to tackle isolation, high incidence of obesity, anti-social behaviour, community cohesion.
- Protected characteristics (age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, and sexual orientation) and their potential impact on:
 - participation
 - inclusion
 - legal requirements
 - organisational policy and procedures
 -

What needs to be learned

Learning outcome 2: Understand the benefits of and barriers to participating in regular sport and physical activity [IS-C&SI]

2A Benefits of participating in sport and physical activity

- Physical benefits of being active:
 - prevention and management of common health conditions, e.g., coronary heart disease, stroke, type 2 diabetes, cancer, obesity, hypertension, osteoporosis
 - reduced resting heart rate.
 - healthy body fat ratio
 - increased muscle mass to maintain strength and prevent degeneration.
 - increased metabolic rate.
- Psychological benefits of being active
 - stress management, reduction of anxiety levels, reduced symptoms of depression
 - improved self-confidence and self esteem
 - positive body image
 - reduced boredom.
 - personal achievement
 - structure and routine
 - fun and enjoyment.
- Social benefits of being active:
 - encourages interaction with other people.
 - education and lifelong learning
 - develops leadership skills.
 - builds social cohesion, e.g. forming positive relationships, breaking down barriers, integrating communities, better understanding of each other
 - reduction in antisocial behaviour
 - crime reduction and improved community safety
- Economic benefits of being active:
 - improved health and well-being reduce strain on public services e.g. fewer working days lost to ill health and injury
 - economic benefits, e.g., employment in associated industries, money spent on leisure.
 - economic regeneration of local communities

What needs to be learned

2B Barriers to participation in sport and physical activity

- Access to sport or physical activity:
 - location of sport or physical activity
 - limited accessible transportation.
 - resources
 - types of sport or physical activity available
- Cost of participation:
 - clothing
 - equipment
 - transport
 - session fees, registration or ongoing costs of attending
- Cultural barriers:
 - requiring single sex sport or physical activity sessions
 - social norms of participating
 - appropriate clothing to participate.
 - racism (perceived or real)
 - lack of role models from own cultural background.
- Disability
 - seen
 - unseen
 - adaptations required.
 - access to opportunities
- Medical concerns or restrictions
 - injury
 - illness
 - chronic health conditions e.g., asthma
 - Medical referral or GP liaison
- Personal barriers:
 - body image
 - lack of self-confidence
 - negative attitudes towards participation

What needs to be learned

- parental or guardian influence
- limited previous participation.
- low fitness levels
- extended time off from previous participation
- concerns that taking part in sport or physical activity may make existing health conditions worse.
- Time – lack of time due to other commitments:
 - family
 - school
 - work

2C Overcoming or minimising barriers to participation in sport and physical activity

- Access:
 - public transport discounts
 - cycle hire to access the facility.
 - free parking
 - taster days
- Cost:
 - discounted pricing
 - hiring of equipment
 - free car parking.
- Cultural barriers:
 - women only physical activity sessions staffed by females.
 - diversity of staff working at sport or physical activity facility
 - staff training in cultural awareness.
- Disability
 - increased range of provision of sports and physical activities
 - ramps
 - assistive technology to include pool hoist, Braille information and signage, hearing loops.
- Medical
 - signposting to professionals e.g., GP, physiotherapist, councillor, dietician

What needs to be learned

- specific groups e.g., heart health, weight management
- wrap around support e.g., considering a range of lifestyle factors alongside physical activity to maximise health and wellbeing.
- medical referral, exercise on prescription programmes.
- Personal barriers:
 - private changing rooms
 - allowing participants to wear clothing they feel most comfortable in
 - use of variety of images of people with different body shapes
 - welcoming environment
 - staff training to support all types of participants and their needs.
 - who can support e.g., family, friends, work
 - parent and child activity sessions to create familial culture of sport.
 - campaigns to increase participation.
- Time:
 - creche facilities
 - extended opening hours.

Learning outcome 3: Explore personal skills and professional behaviours for working in the sport and active leisure industry

3A Behaving professionally

- Reasons for behaving professionally, e.g., personal reputation, organisational reputation, customer satisfaction, client trust, personal integrity.
- Ways to portray a professional image, e.g., well-mannered and polite, respectful, self-disciplined, creative and able to problem solve, be able to listen and show empathy, customer focused, effective communicator, be punctual and efficient, work as part of a team, relevant membership of professional organisations, respect equality and diversity, have basic literacy, numeracy and IT skills, relevant professional qualifications.
- Ways to proactively support the organisation's visions and values.
- The importance of interacting positively with customers, e.g., friendly, outgoing, empathising, sharing key business messages
- Demonstrating pride in own role through a consistently positive and professional approach.

3B Demonstrating professional skills and behaviours

- Honesty, sincerity and integrity - by doing the right thing at the right time.

What needs to be learned

- Positive attitude to work.
- Being approachable and friendly.
- Modelling an active lifestyle.
- Showing empathy and concern for customer's welfare and wellbeing.
- Showing a willingness to 'go the extra mile'.
- Demonstrating enthusiasm to work as a member of a team.
- Using own initiative.
- Being adaptable.
- Being confident in one's own ability.
- Building meaningful and appropriate relationships.
- Showing a willingness to learn and a desire to contribute to own continuing professional development.
- Ability to communicate with a wide range of customers in different ways, e.g., face to face, electronically, via telephone.
- Adapting communication methods to meet the needs of different clients.
- Developing rapport and positive relationships, e.g., appropriate topics of conversation for different clients, positive/open body language, maintaining eye contact and smiling.
- Creating a positive and motivating environment.
- Dealing with conflict – developing strategies to avoid and manage conflict.
- Knowing when and how to seek assistance.

3C Working with others

- Customers, clients
- Internal stakeholders:
 - colleagues
 - peers
 - managers.
- External stakeholders:
 - suppliers e.g., equipment, maintenance, support services
 - other professionals
 - potential customers, clients
 - local businesses

What needs to be learned

- shareholders
- community.

3D Sustainable practices in the sport and active leisure industry

- Reducing energy use e.g.,
 - Turning off gym equipment
 - Shutting of lights
 - Checking energy consumption of equipment prior to purchase
 - Use of renewable energy
- Reducing waste e.g.,
 - Digital signage and communication
 - Recycling waste
 - Reduction in single use plastics
- Reducing pollution e.g.,
 - Environmental conscious food and products
 - Sustainable travel to health and fitness provider
 - Environmentally friendly cleaning products

What needs to be learned

Learning outcome 4: Explore methods to carry out safe and legal working practices in the sport and active leisure industry [MY-TPR]

4A Legal and regulatory requirements

- Knowing the relevance of current applicable legislation.
- Health and Safety at Work Act.
- Health and Safety Regulations (First Aid).
- The Reporting of Incidents, Diseases and Other Dangerous Occurrences Regulations (RIDDOR).
- Control of Substances Hazardous to Health (COSHH) Regulations.
- Health and Safety (Safety Signs and Signals) Regulations.
- Equality Act.
- Safeguarding and safe supervision of children and vulnerable adults.

4B Policies in sport and physical activity

- Knowing the relevant organisational policies.
- Health and safety.
- Contracts of employment.
- Risk assessment and risk management.
- Equality and diversity.
- Manual handling, e.g., assembling, dismantling and storing equipment.
- Personal protective equipment (PPE).
- Normal operating plan (NOP).
- Emergency action plan (EAP).
- Storage plans.
- Importance of organisations writing, implementing and adhering to standard policies.
- Implications of not having or adhering to standard policies.

4C The role and impact of relevant organisations

- National Governing Bodies (NGB).
- Health and Safety Executive (HSE).
- Chartered Institute for the Management of Sport and Physical Activity (CIMSPA).
- Government funded organisations.

4D Safeguarding and protection of children, young people and adults at risk of

What needs to be learned

harm in sport and active leisure

- Meaning of safeguarding.
- People that safeguarding applies to:
 - children – any person under the age of 18
 - adults at risk of harm – individuals aged 18 or over that may need community care services or who are not able to protect themselves against significant harm or serious exploitation.
- Child protection.
- Safeguarding and protecting children legislation eg DBS checks, Safeguarding officers.
- Role of the relevant safeguarding bodies, e.g., child Protection in Sport Unit, NSPCC.
- Appropriate behaviour around children, e.g., listening to and respecting children at all times, treating all children without prejudice or discrimination, using appropriate language, challenging unacceptable behaviour, ensuring that there is more than one adult present during activities with children and young people or that they are in sight or hearing of other adults.
- Inappropriate behaviour around children, e.g., patronising children, developing inappropriate relationships, having contact with children outside of the work role, giving children personal contact details, threatening children, making inappropriate promises, particularly related to confidentiality, exaggerating or trivialising child abuse issues.
- Procedures to follow for in raising concerns of safeguarding or child protection.
- Procedures to respond to a disclosure.
- Organisation policies and procedures for safeguarding and protecting children.
- Scope of own and others' role in safeguarding and protecting children.

Learning outcome 5: Understand the importance of inclusivity in the sport and active leisure industry

5A Providing a range of activities in the community

- Taster sessions – free sessions to provide people with an idea of what the activity or sport involves with no commitment or cost.
- Drop-in sessions – sessions run throughout a day for people to have a go at a new sport or activity, can drop in a time that suits them to fit around other commitments.
- Street games – sports that can take place on community streets if there are limited designated spaces for sports in a community.

What needs to be learned

- Sports festivals – sport specific, e.g., rugby club sports festivals that include short games, e.g. rugby 7's and tag rugby, or multi sports for people to try new sports, e.g. water sports festival.
- Voluntarily run physical activity sessions, e.g., running clubs, circuit training, netball/rugby/basketball/football clubs etc.
- Sport specific clubs – often run by qualified coaching staff and supported by volunteers, including behind the scenes.

5B Using strategies that support diversity, equality and inclusion to enable and encourage people to participate in sport and physical activity

- Awareness of under-representation of groups in the community in sport and physical activity.
- Awareness and understanding of the range of diversity, equality and inclusion issues that must be considered.
- Support opportunities to overcome barriers that can contribute to under-representation and lack of inclusivity:
 - cost of activity
 - lack of transport
 - lack of appropriate changing facilities
 - not interested in sport
 - activity stereotyping
 - time or day of activity
 - lack of childcare.

5C Promoting inclusive sport and physical activity for all

- The Equality Act 2010 - legal requirements that must be met in respect of equality and diversity in the context of community sport and activity:
 - cultural awareness
 - mental wellbeing
 - inclusivity
 - working with adults at risk of harm and older adults
- Planning for sessions that are inclusive, e.g., that take account of age, race, gender, disability, fitness, mental health.
- Activities which recognise individuals' barriers and provide opportunities to help overcome these.
- Activities which target individual needs and can be adapted to meet these.

What needs to be learned

- Sessions which provide achievable goals to meet individual needs.
- Activities that promote fun, socialisation, participation, build positive self-confidence.
- Sessions that aim to develop lifelong changes to activity habits:
 - sessions which inspire participants to engage in activities.
 - sessions which raise awareness of healthier lifestyles
 - sessions which educate participants to make their own changes.
- Using feedback and records to adapt activity sessions.

Essential information for tutors and assessors

Employer involvement

This unit would benefit from employer involvement in the form of:

- structured work experience opportunities in a leisure organisation, where students can apply their skills and develop a better understanding of what the role they are undertaking involves.
- a masterclass by a leisure provider, e.g., leisure centres on how they deliver high-quality customer service and promote equality and diversity in their organisations.

Essential resources

For this unit, students will need access to:

- a leisure facility
- health and safety, equality and diversity legislation documents
- opportunities to communicate with customers and colleagues.

Wider skills

Transferable skills

Managing Yourself	Effective Learning	Interpersonal Skills	Solving Problems
MY – TPR *	EL – MOL	IS – WC	SP – CT
MY – PS&R	EL – CL	IS – V&NC	SP – PS
MY – COP	EL – SRS	IS – T	SP – C&I
MY – PGS	EL – PRS	IS – C&SI *	

Table key

*	Signposted as part of learning. Requires additional assessment for student to achieve this TS
Blank	TS not embedded or signposted in unit

Sustainability skills

Elements of the following UN Sustainability Development Goals will be covered in completing this unit.

Goal 3: Good health and wellbeing

Goal 4: Quality education

Goal 10: Reduce inequalities.

Assessment

This unit is internally assessed. To pass this unit, the evidence that students present for assessment must demonstrate that they have met the required standard specified in the learning outcomes and assessment criteria.

The assessment for this unit should be set in a specific organisational context, it should draw on learning from the unit and be designed in a way that enables students to meet all the assessment criteria.

Mandatory evidence requirements are given below - centres may adapt surrounding contexts but must ensure that evidence is produced as stipulated. An indicative form of assessment is provided in the accompanying sample assessment material.

Mandatory evidence requirements

There are no specific mandatory evidence requirements for this unit.

Essential information for assessment decisions

Learning outcome 1

For distinction standard, students will:

- comprehensively evaluate the various factors that influence participation in sport and physical activity at different ages and stages in a person's life. Students will fully consider how the factors they identified could encourage or discourage participation. They carry out research in order to support their answer with facts and figures (e.g., the percentage drop off in participation by girls of school leaving age).

For merit standard, students will:

- describe the different ways in which people might participate in sport and/or physical activity at different times in life, e.g., as a child, during adolescence and as an adult, including the various factors that might influence their participation at each identified stage.

For pass standard, students will:

- outline where people are likely to experience sport and physical activity at different stages in their lives (as a child, during adolescence and as an adult), for example at

school, in the community. Students will also outline how sport is likely to be accessed during these different life stages (for example as a compulsory PE lesson, optionally during extracurricular clubs), for fitness, as a competitive activity, as an organised event, during leisure time.

Learning outcome 2

For distinction standard, students will:

- evaluate barriers to individual and community participation, as researched in consultation with service users and other relevant stakeholders and then evaluate a range of strategies that could be used to reduce or remove each of these identified barriers, making suggestions which are realistic and workable within the parameters that the community and its members operate in. Students will use their knowledge of the benefits of participation and of leading active and healthy lifestyles when considering ways to minimise or remove actual and perceived barriers for community members.

For merit standard, students will:

- explain key physical, psychological, social and economic benefits for individuals and/or community groups, of taking part in regular sport or physical activity. Students will use insight gained from speaking with community members to support their answer.
- explain barriers that may prevent or reduce regular sport or physical activity participation. Again, students will include evidence gained from consulting with community members to support their answer. Students will, for some of the identified barriers, explain how they may be reduced or removed, suggesting solutions which are realistic and workable within the parameters of the local community.

For pass standard, students will:

- identify key benefits to an individual of regularly participating in sport or physical activity, including some information on physical, psychological, social and/or economic benefits. Students will not have consulted directly with community members, but may have gathered their evidence from online, written, anecdotal or other sources.
- identify some of the barriers that might prevent an individual taking part in regular sport or physical activity and suggest ways in which each barrier may be minimise or overcome.

Learning outcome 3

For distinction standard, students will:

- evaluate the effects of personal skills and professional behaviours (teamworking, effective communication, cooperation, compromise etc.) on the effective building of positive relationships with external (customers, participants, clients, other professionals) and internal (colleagues, peers, managers) stakeholders. Students will evaluate the potential positive effects of behaving in this way as well as the possible negative impact of not doing so. Students should recognise the difference between establishing and maintaining good working relationships with those they lead and with those they work alongside as colleagues and account for this in their evidence.

Students will also consider the role that a mentor can play in supporting the development of weaker areas of professional practice.

For merit standard, students will:

- explain the effect/s of personal skills and professional behaviours (effective communication, cooperation, compromise etc.) on their ability to build positive relationships with external stakeholders (customers, participants, clients, other professionals) as well as on being able to work effectively as part of a team with internal colleagues.

For pass standard, students will:

- outline the ways in which personal skills and professional behaviours can support the building of positive relationships with clients, customers and/or participants in the sport and active leisure industry.
- They will describe sustainable practice in the sport and active leisure industry to reduce energy use, reduce waste and reduce pollution and outline the importance of these as part of a professional behaviour when working in the sport and active leisure industry.

Learning outcome 4

For distinction standard, students will:

- select a job role of their choice and consider the impact and importance of relevant national guidelines, legislation and policies. Students must include child protection as well as other key guidelines, legislation and policies they feel are appropriate. Students will analyse each with direct reference to their selected job role and explain the potential ramifications of not implementing or following them in this role.

For merit standard, students will:

- select a job role of their choice in the sport and active leisure industry and, with direct reference to that job role, explain the use of relevant national guidelines, legislation and policies, including child protection.

For pass standard, students will:

- identify national guidelines, legislation and policies that are relevant to working in the sport and active industry. Students will do this with a specific job role in mind or from a more general 'sporting landscape' viewpoint. Students will also outline child protection and safeguarding rules and responsibilities relevant to working in sport and active leisure, again having a specific job role in mind may support students in their answer.

Learning outcome 5

For distinction standard, students will:

- evaluate measures that can be taken by a club, coach, leader, sports facility or other sport and/or physical activity provider, to ensure they provide opportunities that meet the identified needs of the people and groups accessing them, and that they also promote equality and diversity, allowing anyone who wishes to take part to do so.

For merit standard, students will:

- explain ways in which the needs of all community members can be catered for, through the provision of sport and physical activity, which is wide ranging, tailored and appropriate for all.

For pass standard, students will:

- identify different types of activity that can be provided, to meet a range of community needs.
- outline ways in which sport and physical activity can be inclusive for a wide range of community members.

Unit 2: Exercise Instructor Knowledge and Skills Development

Level:	2
Unit type:	Mandatory
Assessment type:	Internal
Guided learning hours:	60

Unit in brief

Students explore the underpinning knowledge and skills required to work with clients as an instructor in the exercise and fitness industry.

Unit introduction

More and more people are using gym and fitness facilities, and, as such, exercise and fitness centres are needing more instructors working for them to support this demand.

The role of an exercise instructor includes both client-facing skills and less overt but vital knowledge, understanding and skills that are necessary to carry out this role successfully and effectively.

In this unit, you will study the anatomy and physiology that an exercise instructor needs to know. It is this underpinning knowledge of the body systems and how they respond to physical activity, that is the cornerstone of effective exercise session and programme design.

You will learn the importance of customer service and the skills and techniques that will enable you to fully support clients in all areas of the gym or fitness facility. You will also learn how to ensure prospective and existing clients are safe and ready to exercise, what steps to take to keep them safe and how to maximise their chances of adhering to an exercise programme in the medium to long term.

This unit will help you to progress to employment in the exercise and fitness industry. The unit will also help you to progress to further study in higher education or professional qualifications in instructing exercise and fitness as a personal trainer, or to working with special populations and medical referrals.

Learning outcomes and assessment criteria

To pass this unit, students need to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Pass	Merit	Distinction
Learning outcome 1: Explore the body systems and their response to exercise		
1.P1 Outline the structure and function of the cardiorespiratory, musculoskeletal, energy digestive and nervous systems.	1.M1 Explain how the structure and function of the cardiorespiratory, musculoskeletal, energy digestive and nervous systems respond to acute and chronic exercise participation.	1.D1 Assess the response of the cardiorespiratory, musculoskeletal, energy and nervous systems to chronic exercise improve performance.
1.P2 Outline the response of the cardiorespiratory, musculoskeletal, energy and nervous systems to acute and chronic exercise participation.		
1.P3 Outline the principles of biomechanics in exercise.		

Learning outcome 2: Examine ways to respond to customer needs to provide effective customer service

2.P4 Demonstrate communication skills in a customer service role in a fitness facility. [IS-V&NC]	2.M2 Communicate in an engaging and effective way to fulfil a customer service role in a fitness facility.	2.D2 Use a range of appropriate communication skills to fulfil a customer service role in a fitness environment, selecting and adapting methods of communication to best suit customer needs.
2.P5 Carry out cleaning activities in a fitness environment.	2.M3 Select and use appropriate products and equipment to carry out effective cleaning in a fitness environment.	2.D3 Follow organisational processes and carry out comprehensive and effective cleaning activities, selecting and using appropriate products and equipment.

Learning outcome 3: Understand the use of risk management and the client referral process

3.P6 Outline the use of risk stratification models to safeguard client participation.	3.M4 Describe the roles of other health professionals and in what circumstances it may be necessary to refer clients to them.	3.D4 Evaluate the roles of other health professionals including reasons for client referral to them, their responsibilities to the client, and the potential impact on the client of their involvement.
3.P7 Outline the reasons why it may be necessary to refer a client to another health professional.		

Unit content

What needs to be learned

Learning outcome 1: Explore the body systems and their response to exercise

A1 Cardiorespiratory system

- Location of the heart and lungs.
- Structure of the cardiovascular system including right atrium, left atrium, right ventricle, left ventricle, blood flow through the heart, systemic and pulmonary circulation.
- Blood vessels leading into and out of the heart including aorta, vena cava, pulmonary artery, pulmonary vein, Venous return Cardiac output at rest (stroke volume x heart rate)
- Function of the cardiovascular system including delivering blood and nutrients to the body, remove waste products, thermoregulation.
- Structure and functions of blood vessels including veins, arteries, capillaries.
- Blood pressure including systolic and diastolic blood pressure, normal, hypertension and hypotension pressure classifications.
- Structure of the respiratory system including trachea, bronchus, bronchioles, alveoli, diaphragm, intercostal muscles, passage of air through the respiratory tract.
- Function of the respiratory system including gaseous exchange of oxygen and carbon dioxide in the lungs.
- Internal and external respiration.
- Tidal volume at rest.
- Breathing rate at rest.
- Cardiorespiratory responses to acute exercise:
 - anticipatory increase in heart rate
 - increase in heart rate.
 - increase in breathing rate and tidal volume.
 - factors affecting venous return and the implications of 'blood pooling' at the end on the exercise session.
- Cardiorespiratory response to chronic exercise:
 - cardiac hypertrophy
 - increase in stroke volume
 - increase in cardiac output, decrease in resting heart rate.
 - capillarisation

What needs to be learned

- increase in blood volume
- reduction in resting blood pressure
- increase in breathing rate
- neural and chemical control of breathing rate
- decreased recovery time
- Cardiorespiratory (cardiovascular and respiratory) system in special population groups including children/young people, ante/postnatal and older adults.

A2 Musculoskeletal system

- Location of the main bones of the skeleton including cranium, clavicle, ribs, sternum, humerus, radius, ulna, scapula, ilium, pubis, ischium, carpals, metacarpals, phalanges, femur, patella, tibia, fibula, tarsals, metatarsals, vertebral column (cervical, thoracic, lumbar vertebrae, sacrum, coccyx).
- Bones in the axial skeleton and appendicular skeleton.
- Functions of the skeleton including protection, blood production, movement, shape, storage of minerals.
- Classification of bones including short, long, flat, irregular, sesamoid.
- Structure of bone including articular cartilage, epiphysis, diaphysis, periosteum, epiphyseal plates, bone marrow.
- Stages of bone growth.
- Bone remodelling including osteoclasts and osteoblasts, vitamin D, calcium, hormones involved in bone remodelling (oestrogen).
- Tendons including structure and function.
- Ligaments including structure and function.
- Cartilage including role, location, structure and function.
- Classification of joints including fixed/fibrous, slightly movable/cartilaginous, synovial.
- Structure of synovial joints including joint capsule, synovial membrane, synovial fluid, ligaments, tendons, hyaline cartilage, fibrocartilage.
- Types of synovial joint and their range of motion including, flexion and extension, adduction and abduction, circumduction, supination and pronation, plantar flexion and dorsiflexion, lateral flexion and extension, horizontal flexion and extension, elevation and depression, inversion, and eversion.
- Posture including curves of the spine, neutral spine alignment, movement potential of the spine and postural deviations of the spine.

What needs to be learned

- Structure of the muscular system including cardiac muscle, smooth muscle, skeletal muscle, characteristics, and functions of each type of muscle tissue.
- Structure of skeletal muscle.
- Location of major anterior and posterior muscles including biceps, triceps, deltoids, pectoralis major, rectus abdominis, rectus femoris, vastus lateralis, vastus medialis, vastus intermedius, semimembranosus, semitendinosus, biceps femoris, gastrocnemius, soleus, tibialis anterior, erector spinae, teres major, trapezius, latissimus dorsi, obliques, gluteus maximus.
- Structure and function of the pelvic floor muscles.
- Types of muscle action including concentric, eccentric, isometric, isokinetic.
- Joint actions brought about by specific muscle group contractions.
- Skeletal muscle fibre types, their characteristics, and the types of sport each are associated with Type 1, Type 2a, Type 2b.
- Musculoskeletal response to acute exercise:
 - increased blood supply to muscles
 - increase in muscle pliability.
 - increased range of movement
 - muscle fibre micro tears.
- Musculoskeletal response to chronic exercise:
 - the remodelling process and the role of osteoblasts and osteoclasts.
- Effects of different types of exercise:
 - weight-bearing exercise:
 - transmission of stress caused by impact.
 - Hormones – testosterone, growth hormone
 - body weight
 - calcium
 - vitamin D
 - resistance-based exercise:
 - hypertrophy
 - muscle balance
 - increase in tendon strength.
 - increased muscle strength
 - increased tolerance to lactic acid

What needs to be learned

- increase in bone calcium stores.
- increased thickness of hyaline cartilage
- aerobic-based exercise:
 - increase in myoglobin stores.
 - increased number of mitochondria
 - increased storage of glycogen and fat
 - increased stretch in ligaments
 - increased production of synovial fluid.
- Delayed onset of muscle soreness (DOMS) causes and effects.
- Musculoskeletal system in special populations:
 - adolescence including growing pains, development of peak bone mineral density, common overtraining/overuse injuries, e.g., jumper's knee.
 - ante- and postnatal women/women in perimenopause or menopause
 - postural changes including forward flexed with shoulder girdle protraction, thoracic kyphosis, long, weak upper back extensors, and short tight pectoral muscles and are prone to neck and shoulder pain.
 - the effect of pregnancy on joint alignment and posture, hormonal changes increase risk of injury, joint misalignment, muscle imbalance and motor skill decline.
 - older adult – the ageing process on bone remodelling, joints, muscle strength, power, bone density, reduced flexibility, and mobility.

A3 Energy systems

- Phosphocreatine.
- Lactic acid system.
- Aerobic energy system.
- Use of carbohydrates, fats and proteins in the production of ATP.
- Response of the energy systems to exercise:
 - energy systems' response to acute exercise:
 - exercise and sports that use these systems to provide energy.
 - anabolism and catabolism
 - fatigue from by-products of the energy systems
 - recovery including recovery time, EPOC.
 - energy system's response to chronic exercise:

What needs to be learned

- increased use of fat as a fuel
- increased stores of glycogen
- increased removal of lactic acid
- effect of endurance training methods utilising more body fat for energy production whilst exercising

A4 Digestive system

- Structure and function of each part of the digestive system including mouth, oesophagus, stomach, small intestine, large intestine.
- Digestion of fats, proteins, carbohydrates, main enzymes involved.
- Dietary fibre sources and function.
- Function of the liver in digestion.
- Function of the pancreas in digestion.
- Timescales for digesting different macronutrients.
- Fluid in digestion.

A5 Nervous system

- Role and functions of the central nervous system.
- Principles of muscle contraction – action potential to trigger muscle contraction.
- The ‘all or none’ law/motor unit recruitment.
- Nervous system response to chronic exercise:
 - enhanced neuromuscular connections.
 - improved motor fitness.
- The nervous system in special populations:
 - older adults – reduced balance and coordination, reduced motor learning, reduced visual and aural acuity, poorer short-term memory.

A6 Biomechanics of movement in exercise

- Planes of movement:
 - frontal
 - sagittal
 - transverse.
- Anatomical terms:
 - superior and inferior
 - anterior and posterior

What needs to be learned

- medial and lateral
- proximal and distal
- superficial and deep.
- The effect of exercise variables on biomechanics and kinesiology including:
 - Muscle attachments and levers.
 - Lack of biomechanical efficiency:
 - reduction in transmission of stress
 - increased risk of injury
 - increased loading placed on synergists.

Learning outcome 2: Examine ways to respond to customer needs to provide effective customer service

B1 Examine local demographics and customer needs

- Students should understand the demographic of the leisure facility they are focusing on in order to best meet the needs of their customers.
- The effect of local demographics on leisure provision and participation within the identified organisation:
 - type of customers, e.g., age, gender, ability, disability, culture
 - customer needs, e.g., access, language, timetabling, economic environment
 - customer wants, e.g., type/s of class or activity, other services on offer.
- Methods of identifying customer needs and wants, e.g., informal conversations, meetings, questionnaires, online surveys.
- How to encourage social inclusion, e.g., off-peak memberships, wide range of activities to suit all cultures, single-sex sessions, specialist sessions at certain times of the day to cater for specific groups of clients, use of positive imagery in advertising.

B2 Use of customer feedback to inform customer service

- Purpose of feedback, e.g., retain members, so they continue their memberships, improve client experience, develop areas of weakness in provision, gauge interest in new initiatives.
- Methods of gaining and recording feedback, e.g., one-to-one discussion with client, feedback forms, email, questionnaires, polls, online surveys.
- Reporting feedback, e.g., to line manager or other stakeholders, in line with organisational procedure.

What needs to be learned

- How feedback can be used to increase customer satisfaction and meet business targets, e.g., evaluating information collected, prioritising change, gaining further/more detailed information, actioning changes in service provision, completing the 'feedback cycle' to ensure customer views have been taken into consideration and acted on.
- Interpret and use customer feedback and data to understand different types of customers and their needs.

B3 Provide customer service in a fitness facility

- Engage with customers in a friendly and approachable manner to display exemplary customer service:
 - show an awareness of the organisation's products and offers.
 - know the customer journey.
- Communication methods:
 - verbal communication
 - open and closed questioning
 - active listening
 - use of appropriate topics of conversation to engage customers in conversation.
 - non-verbal communication:
 - hand gestures
 - eye contact
 - body language
 - Observation of customers non-verbal communication.
- Adapting communication methods to meet the needs of different clients:
 - maintaining equal contact with all clients
 - awareness of cultural differences
 - gender sensitivity.
- Enquiries, e.g., face to face, telephonically, email, social media.
- Building rapport:
 - appropriate topics of conversation for different clients
 - knowledge of training activities
 - positive/open body language
 - maintaining eye contact and smiling
 - respecting equality and diversity.

What needs to be learned

- deal with enquires face-to-face, over the phone, by email and/or through social media.
- display a professional demeanour, e.g., uniform, suitable language and topics of conversation, use of discretion
- use appropriate written communication methods, e.g., digital media and profiles.
- work well with others as part of a team Conflict management:
 - dealing with customers, e.g., annoyed customers, upset customers
 - tone of voice
 - body language
 - use of professional language
 - referral to supervisor, following organisational processes.
 - walk the gym floor and liaise with clients, e.g., choose the right time to interact, not interfering with client's gym session unnecessarily, assisting clients who need help with gym equipment.

B4 Maintain a safe and pleasant fitness environment

- Ensure facilities are clean and hygienic:
 - know the standards expected.
 - use appropriate cleaning products and equipment as necessary, e.g. anti-bacterial spray, floor cleaner, bleach, multi-surface cleaner, mop, brush, cloths.
- Maintain own and others' safety while cleaning by applying organisational health and safety policies regarding cleaning, e.g. use of PPE.
- Use signage and communicate during cleaning activities as appropriate.
- Use a cleaning schedule to maintain high standards of hygiene and cleanliness.
- Record the cleaning activities following organisational policy and procedures.

B5 Follow safe operating procedures

- Follow standard operating procedures to ensure safety of self and others:
 - follow organisational procedures e.g.:
 - risk assessment and reporting
 - routine maintenance
 - emergency action plans
 - COSHH
 - manual handling

What needs to be learned

- electrical safety
- DBS and safeguarding
- equality and diversity
- personal liability insurance
- adhere to manufacturers' guidelines when setting up, taking down and storing equipment.
- identify hazards relating to activity areas, people and physical risk.

B6 Develop self and the business

- Work well with others as part of a team:
understand the mentoring process -supporting peers to meet personal targets.
- Keeping up to date with industry trends:
 - accessing regular and industry recognised CPD
 - understanding the CIMPSA professional standards.
- Importance of self-reflection/evaluation.
- Skills and abilities required to work alone with minimal supervision and with others, e.g., time management, adaptability, confidence, identify own strengths and weaknesses.
- Keeping up to date with financial planning e.g., music licence fees, profit and loss, playing tax and national insurance.

What needs to be learned

Learning outcome 3: Understand the use of risk management and the client referral process

C1 The importance of risk stratification to safeguard client participation

- Definition of risk stratification.
- Legal and ethical implications surrounding risk stratification:
 - for self
 - for the organisation
 - for the client.
- Using risk stratification alongside other health and fitness screening procedures:
 - relationship between risk stratification, health screening and fitness testing, e.g. strengths, weaknesses, limitations.

C2 Risk stratification models and how to risk stratify clients

- Recognised tools:
 - Irwin and Morgan traffic light system
 - other national/international evidence-based tools, e.g., ACSM guidelines, CAD risk factor chart
 - national/locally agreed protocols/referral/care pathways.
- Methods of collecting information, e.g., client consultations, questionnaires.
- Client referral process if identified as at risk.
- Professional role boundaries and limitations to scope of practice:
 - client confidentiality
 - data protection
 - type of information that can be collected.
 - awareness of the need for sensitivity surrounding data collecting.
- Assessment of risk:
 - factors that indicate that a client is at low, medium or high risk.
 - contraindications to exercise e.g.:
 - relative
 - absolute.
- Circumstances in which the client would require referral to other specialist exercise professionals and/or medical professionals.

What needs to be learned

- Range of relevant exercise or health professionals that clients can be signposted/referred onto when they are beyond own scope of practice/area of qualification.

C3 Behaviour change and exercise adherence

- The process of behaviour change:
 - the stages of change/trans-theoretical model of behaviour change.
- The role of intrinsic and extrinsic motivation in exercise adherence.
- Techniques/approaches that can motivate adherence to exercise, e.g., wearable technology, connection through social media groups, creating a positive environment that motivates and empowers clients and promotes adherence to exercise, to support goal achievement.

Essential information for tutors and assessors

Employer involvement

This unit would benefit from employer involvement in the form of:

- guest speakers
- work experience
- support from local health and fitness centres.

Essential resources

For this unit, students will need access to:

- anatomy and physiology related textbooks, internet resources
- a fitness facility such as a gym or health and fitness club.

Wider skills

Transferable skills

Managing Yourself	Effective Learning	Interpersonal Skills	Solving Problems
MY – TPR	EL – MOL	IS – WC	SP – CT
MY – PS&R	EL – CL	IS – V&NC ✓	SP – PS
MY – COP	EL – SRS	IS – T	SP – C&I
MY – PGS	EL – PRS	IS – C&SI	

Table key

*	Signposted as part of learning. Requires additional assessment for student to achieve this TS
blank	TS not embedded or signposted in unit

Sustainability skills

Elements of the following UN Sustainability Development Goals will be covered in completing this unit.

Goal 3: Good health and wellbeing

Goal 4: Quality education

Goal 10: Reduce inequalities.

Assessment

This unit is internally assessed. To pass this unit, the evidence that students present for assessment must demonstrate that they have met the required standard specified in the learning outcomes and assessment criteria.

The assessment for this unit should be set in a specific organisational context, it should draw on learning from the unit and be designed in a way that enables students to meet all the assessment criteria.

Mandatory evidence requirements are given below- centres may adapt surrounding contexts but must ensure that evidence is produced as stipulated. An indicative form of assessment is provided in the accompanying sample assessment material.

Mandatory evidence requirements

Observation records/video evidence of communicating with customers and carrying out cleaning activities in a fitness environment to fulfil the assessment criteria for Learning Outcome 2

Essential information for assessment decisions

Learning outcome 1

For distinction standard, students will:

- comprehensively explain how the cardiorespiratory, musculoskeletal, energy and nervous systems respond to exercise in both the short and long term, showing clear cause and effect by using valid examples to support their answer. They will justify how these adaptations support improvement in exercise performance.

For merit standard, students will:

- describe, in some detail, both the structure and the function of each of the body systems (cardiorespiratory, musculoskeletal, energy and nervous systems).
- explain the effects of exercise on each body system both in the short and long term, including an understanding of how special populations body systems may differ from the average adult body systems, showing clear cause and effect for each element included.

For pass standard, students will:

- outline the structure and function of each of the body systems (cardiorespiratory, musculoskeletal, energy and nervous systems) and the effects of exercise on each body system both in the short and long term. They will include an outline of how special populations body systems may differ from the average adult body systems.
- outline the principles of biomechanics including the different planes of movement and the types of movement that occur in each. They will include the different classification of levers and give examples of where each can be found in the body. They may omit some information.

Learning outcome 2

For distinction standard, students will:

- take on a customer service role in a fitness facility, recognising the need to select and adapt communication methods and skills. Students will consider the environment they are in, the tools at their disposal and the specific needs of clients in order to communicate effectively with a range of clients. This may include over the phone, using written media (email, letters), use of social media to reach a wide audience, face-to-face conversations, dealing with enquiries and complaints, and knowing when to refer a client to a manager.
- follow organisational procedures (for example cleaning rota or schedule) to carry out cleaning duties as required. Students must show use of their own initiative to ensure a clean and hygienic fitness environment, including dealing with impromptu cleaning requirements (for example spills, accidents) as well as routine cleaning (for example wiping down machines). They will select and use the most appropriate product/s and tool/s for the cleaning job required. Students will select, use and put away cleaning materials and products, ensuring that they are meeting health and safety requirements.

For merit standard, students will:

- take on a customer service role in a fitness facility, assist customers in a friendly, approachable way to meet different expectations. They will demonstrate that they can use verbal communication skills effectively, adapt their verbal and non-verbal communication style to meet the needs of different individuals and is able to use active listening skills and checks understanding with an individual They will be able to deal with a customer enquiry, a request and resolving a complaint, and meet some of the customer expectations. They show awareness of some products and services available at the leisure facility. They ask advice from their colleagues and refer to their supervisor when required.
- conduct safe cleaning activities in a fitness facility, including the use of personal safety equipment and safe systems of work. Students will select and use the most appropriate product/s and tool/s for the cleaning job required. Students will select, use and put away cleaning materials and products, ensuring that they are meeting health and safety requirements.

For pass standard, students will:

- take on a customer service role in a fitness facility, demonstrating a range of customer service skills to a reasonable standard.
- conduct some cleaning activities safely in a fitness facility, including some use of personal safety equipment and safe systems of work.

Learning outcome 3

For distinction standard, students will:

- produce a written report that includes detailed information clearly explaining the roles of other health professionals, including reasons for client referral to them, their responsibilities to the client, and the potential impact on the client of their involvement.

For merit standard, students will:

- describe, in some detail, the roles of other health professionals and in what circumstances it may be necessary to refer clients to them.

For pass standard, students will:

- outline the use of risk stratification models to safeguard client participation and the reasons why it may be necessary to refer a client to another health professional.

Unit 3: Preparing Clients for a Gym-based Exercise Programme

Level:	2
Unit type:	Mandatory
Assessment type:	Internal
Guided learning hours:	60

Unit in brief

Students will explore the need to establish client needs, wants and abilities in order to plan and deliver an effective gym-based exercise programme.

Unit introduction

More than ever, people understand the importance of getting fit and being active as the cornerstones of living a healthy lifestyle. Many people are members of a gym and will work with gym instructors to improve their body composition, get fit and improve mental and social health.

In this unit you will explore the importance of thorough preparatory work as the key to planning and delivering an effective gym-based exercise programme. You will consider the need for and ways to consult with clients to establish what they hope to achieve from undertaking gym-based exercise, you will investigate the process of health screening and fitness testing to ensure the exercise you plan is safe and appropriate and you will look at the use of induction to both familiarise clients with the gym environment and prepare them as they undertake their new health and fitness journey.

This unit is important if you are considering a career in the gym/fitness industry or as a gym instructor. It provides you with the key knowledge and understanding needed in order to plan and deliver gym-based activity that is appropriate, safe and effective for your client/s. There are new staffing requirements for the tutor, assessor and internal verifier for this unit. Please refer to *Section 4 Planning your programme* for further information.

Learning outcomes and assessment criteria

To pass this unit, students need to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Pass	Merit	Distinction
Learning outcome 1: Explore the client consultation process in a gym environment		
1.P1 Outline the importance of a client consultation for a gym-based exercise programme.	1.M1 Assess the importance of a client consultation for both the client and gym instructor and the different methods that can be used for this process.	1.D1 Evaluate the client consultation process, its importance for both client and gym instructor and the different methods that can be used for a range of different clients.
1.P2 Outline the methods used to consult with a client.		
Learning outcome 2: Explore client induction in a gym environment		
2.P3 Outline the purpose of a gym induction.	2.M2 Assess the importance of gym induction for a client and the gym environment.	2.D2 Evaluate the gym induction process, including its importance for a range of clients and the gym environment.
2.P4 Outline the gym induction process for a selected client.		

Learning outcome 3: Prepare clients for a gym-based exercise programme

3.P5 Carry out client consultations including health screening and fitness testing prior to gym-based exercise.	3.M3 Carry out a consultation and induction for a client, adapting the choice of activities to effectively meet the client's needs.	3.D3 Confidently carry out a comprehensive consultation and induction for a client, consistently providing effective client support.
3.P6 Carry out a gym induction for a small group of clients.		

Unit content

What needs to be learned
Learning outcome 1: Explore the client consultation process in a gym environment
A1 Importance of client consultation for gym-based exercise <ul style="list-style-type: none">• Maintaining client safety.• Positive customer experiences.• Client education with regards to the gym instructor's role, responsibilities and limitations.• Establishing and managing client expectations.• Building a strong rapport based on trust.
A2 The client consultation process <ul style="list-style-type: none">• Methods of completing client consultations:<ul style="list-style-type: none">○ formal interview○ informal discussion○ individual consultation○ small-group interaction○ PAR-Q○ questionnaire○ face to face, online, telephone, email.
Learning outcome 2: Explore client induction in a gym environment
B1 Client induction as an opportunity for positive customer service <ul style="list-style-type: none">• The organisation's customer service promise and the importance of exceeding it:<ul style="list-style-type: none">○ providing the client with sufficient information about activities, services and classes○ catering for differing client needs in relation to differing demographics, fitness levels, client goals.○ maintaining data protection, client confidentiality and GDPR regulations○ being professional and approachable in line with organisational standards.• How the customer experience can be enhanced, e.g., class booking systems, use of appropriate technology (social/digital media, sharing of data, results), virtual classes, training sessions.• The importance of informed consent.

What needs to be learned

- Familiarisation with specific policies and procedures and their relevance for the client.

B2 Induction process of a gym environment

- Importance of client induction into the gym environment.
- Inducting clients into the gym environment:
 - walk through of how to use facilities including cardiovascular machines, weight resistance machines, free weights, gym floor, classes studios.
 - booking procedures
 - safe use of facilities including safety clips on treadmills
 - cleaning/wipe down of facilities following usage.
 - knowledge of full range of activities, services and classes including processes for booking
 - awareness of customer service charter and importance of striving to exceed it.
- Adapting inductions for different size groups to ensure effectiveness, including individuals, pairs and small groups.

Learning outcome 3: Prepare clients for a gym-based exercise programme [MY-TPR]

C1 Investigate health screening and fitness assessments

- Health screening tools and assessments that can be used to gather relevant information and establish client needs:
 - PAR-Q
 - medical history questionnaire
 - lifestyle questionnaires including previous and current level of activity, exercise likes and dislikes.
 - health assessment including blood pressure, resting heart rate, BMI, waist circumference.
 - fitness assessment including sub-maximal cardiorespiratory fitness, muscular strength, muscular endurance.
- Assessment of client risk:
 - contraindications to exercise:
 - absolute
 - relative
 - circumstances in which referral to a doctor or other health professional may be required.

What needs to be learned

- reasons for temporary deferral of exercise.
- Use of suitable communication methods to ascertain client needs, establish a rapport, reassure, and support clients.

C2 Plan and carry out client consultations, assessments, and gym inductions

- Plan and carry out a safe and effective consultation to establish the client's needs and wants.
- Guide the client through a safe and effective health screening process, e.g. PAR-Q, medical history questionnaire, lifestyle questionnaire, other consultation forms.
- Conduct safe and effective health and fitness assessments:
 - blood pressure
 - resting heart rate
 - BMI
 - waist circumference
 - sub-maximal cardiorespiratory fitness
 - muscular strength
 - muscular endurance.
- Carry out a gym induction:
 - demonstrating knowledge of the equipment
 - Demonstrating each exercise
 - Provide teaching points.
 - building a good rapport with clients
 - showing empathy
 - in a timely and effective manner
 - providing feedback on technique
 - using group management techniques with groups including encouraging participation, communicating, managing time, offering support and promoting collaboration
 - signposting clients to other areas of the facilities depending on their interests
 - reviewing the gym induction and noting areas for improvement

Essential information for tutors and assessors

Employer involvement

This unit would benefit from employer involvement in the form of:

- guest speakers
- design/ideas to contribute to unit assignment/case study/project materials.
- work experience
- support from local business staff as mentors.

Essential resources

For this unit, students will need access to:

- suitable exercise facilities and equipment, for example a gym with cardiovascular equipment, fixed resistance machines and free weights.
- a range of field fitness testing and health screening equipment
- normative data for interpretation of test results recording equipment, such as a video camera, a tablet, a voice recorder

Wider skills

Transferable skills

Managing Yourself	Effective Learning	Interpersonal Skills	Solving Problems
MY – TPR *	EL – MOL	IS – WC	SP – CT
MY – PS&R	EL – CL	IS – V&NC	SP – PS
MY – COP	EL – SRS	IS – T	SP – C&I
MY – PGS	EL – PRS	IS – C&SI	

Table key

*	Signposted as part of learning. Requires additional assessment for student to achieve this TS
blank	TS not embedded or signposted in unit

Sustainability skills

Elements of the following UN Sustainability Development Goals will be covered in completing this unit.

Goal 3: Good health and wellbeing

Goal 4: Quality education

Goal 10: Reduce inequalities.

Assessment

This unit is internally assessed. To pass this unit, the evidence that students present for assessment must demonstrate that they have met the required standard specified in the learning outcomes and assessment criteria.

The assessment for this unit should be set in a specific organisational context, it should draw on learning from the unit and be designed in a way that enables students to meet all the assessment criteria.

Mandatory evidence requirements are given below - centres may adapt surrounding contexts but must ensure that evidence is produced as stipulated. An indicative form of assessment is provided in the accompanying sample assessment material.

Mandatory evidence requirements

Observation records/video evidence of carrying out consultations and induction with clients to fulfil the assessment criteria for Learning Outcome 3.

Essential information for assessment decisions

Learning outcome 1

For distinction standard, students will:

- evaluate the client consultation process from start to finish, including the ways in which it can benefit both the client and the trainer. Students will assess the positive ways in which a well-handled consultation can facilitate the sharing of information between the client and trainer (and the trainer and client), its importance for building the client-trainer relationship and its use in setting the scene for a positive fitness experience. Students will evaluate the merits of a range of consultation methods, suggesting how, why and in what circumstances each might be most appropriate. As part of their evaluation, students will discuss the potential negative impact of a consultation being handled badly, for example selecting inappropriate methods (sending an email to someone who is not computer literate or holding a small-group consultation for someone with personal issues or concerns they had hoped to share one to one), asking inappropriate questions (that are very personal, that the client is

obviously uncomfortable with, that are not linked to the issue at hand) and/or adopting an inappropriate manner (for example unfriendly, abrupt, ill-mannered).

For merit standard, students will:

- assess the importance of the client consultation, including the positive role it has to play in sharing client information (likes, dislikes, wants, hopes), its importance for building the client-trainer relationship and its use in setting the scene for a positive fitness experience. Students will describe the various methods of consulting with clients, assessing the relative merits of each one. They will also give some detail on the potential negative impact of a consultation being handled badly.

For pass standard, students will:

- give some detail regarding the need for a client consultation prior to exercise. They will understand that consulting with the client will allow an exchange of information that can be used to plan and deliver gym-based exercise but may not appreciate other ways that this process can support the client-trainer relationship. They will outline the different ways that a consultation can take place (for example face to face, questionnaire, group discussion, email) but may not be able to suggest factors that might influence the selection of an appropriate method, the potential positive and negative elements of each method or the effect of the chosen method on the relationship between client and trainer.

Learning outcome 2

For distinction standard, students will:

- evaluate the client induction process from start to finish, including the ways in which it can benefit both the client and the trainer. Students will assess the positive ways in which a well-handled gym induction can facilitate the sharing of information between the client and trainer (and the trainer and client), its importance for building the client-trainer relationship and its use in setting the scene for a positive fitness experience. Students will evaluate the merits of an induction process (from an identified fitness facility or an imagined process). As part of their evaluation, students will discuss the potential negative impact of an induction being handled badly, for example assuming a higher or lower level of knowledge than the client actually has, being patronising or adopting an unfriendly manner.

For merit standard, students will:

- assess the induction process, including its importance for familiarising clients with the facility and gym environment, building the client-trainer relationship and setting the scene for a positive fitness experience. Students will describe the way that a client induction may be carried out, based on an existing process at an identified facility or on a scenario they have created. They will also give some detail on the potential negative impact of an induction being handled badly, for example assuming a higher or lower level of knowledge than the client actually has, being patronising or adopting an unfriendly manner.

For pass standard, students will:

- give some information regarding the purpose of a gym induction. Students will know the main benefits to the client of an effective induction. They will also outline the gym induction process. This may be for an identified fitness facility or gym or could be an 'ideal scenario' process that they have devised themselves.

Learning outcome 3

For distinction standard, students will:

- carry out relevant, detailed client consultations, for example face to face, filling in forms or PAR-Q, to establish client's wants and needs. They fully plan the consultations. They establish a professional rapport with the clients and provide detailed essential information about activities, booking systems, organisational standards and informed consent. They carry out safe and thorough health screening and fitness tests using relevant tools and assessments while providing detailed information about the nature of the tests and why they are conducted. They use the information from the health screen and fitness test to fully explain to the clients any contraindications to exercise and make referrals if necessary. Students confidently introduce the clients to the gym environment by effectively demonstrating and giving detailed explanations of the equipment and exercises. They give effective demonstrations with a wide range of appropriate teaching points to support the clients and consistently provides appropriate support to participants when taking part in the induction. They manage groups effectively using group management techniques. They take on board the clients' interests and results from consultation process and signpost all other areas of the facilities that may interest the clients.

For merit standard, students will:

- carry out client consultations that meets the clients' needs, for example face to face, filling in forms or PAR-Q, to identify clients wants and needs. They establish a rapport with clients by providing most of the essential information about activities, booking systems, organisational standards and informed consent but may not cover all. They carry out safe health screening and fitness tests using some of the relevant tools and assessments, while providing some detail about the nature of the tests and why they are conducted. They use most of the information from the health screen and fitness test to explain to clients any contraindications to exercise. They provide a range of appropriate teaching points to support the clients and frequently provide appropriate

support to participants using appropriate group management techniques when taking part in an induction. They signpost any other areas of the facilities depending on the client's interests.

For pass standard, students will:

- carry out client consultations for example face to face, filling in forms or PAR-Q, and record an outline of a client's wants and needs. They establish a rapport with the clients by providing information about activities, booking systems, organisational standards and informed consent. They may omit some of the information. They carry out safe health screening and fitness tests using some of the relevant tools and assessments. They may only conduct minimal fitness tests, for example blood pressure and heart rate. They use some information from the health screen and fitness test to outline to the client any contraindications to exercise and but may not make referrals where necessary. Students introduce small group of clients to the gym environment by showing them the equipment and exercises being carried with adequate demonstrations of activities and some use of appropriate teaching points and sometimes provides appropriate support to clients when taking part in the induction.

Unit 4: Working as a Gym Instructor

Level:	2
Unit type:	Mandatory
Assessment type:	Internal
Guided learning hours:	120

Unit in brief

Students will explore what it takes to be a gym instructor through the planning and delivery of gym-based exercise.

Unit introduction

More than ever, people understand the importance of getting fit and being active as the cornerstones of living a healthy lifestyle. Many people are members of a gym and will work with gym instructors to improve their strength, endurance, body composition and stay healthy.

In this unit, you will explore what it takes to be an effective gym instructor. You will look at how, as a gym instructor, you can support your clients to achieve their goals. You will learn how to plan gym-based activities so that they meet client goals, you will instruct a gym-based exercise session, showing that you can monitor, adapt and maintain client safety throughout. Finally, you will review your session, identifying strengths and areas in need of future development.

This unit is important if you are considering a career in the gym/fitness industry or as a gym instructor. It provides you with the key knowledge and understanding needed to plan, deliver and monitor gym-based activity and requires you to show that you can work with others, building rapport and communicating effectively, to deliver your session for real.

There are new staffing requirements for the tutor, assessor, and internal verifier for this unit. Please refer to *Section 4 Planning your programme* for further information.

Learning outcomes and assessment criteria

To pass this unit, students need to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Pass	Merit	Distinction
Learning outcome 1: Explore training principles and methods of gym-based exercise programmes		
1.P1 Outline the principles of training that should be applied when planning a gym-based exercise programme.	1.M1 Explain how the principles of training and training methods should be applied when planning a gym-based exercise programme.	1.D1 Evaluate the application of the principles of training to different training methods when planning a gym-based exercise programme.
1.P2 Outline training methods that could be used in a gym-based exercise programme.		
Learning outcome 2: Plan a gym-based exercise programme		
2.P3 Plan a six-week gym-based exercise programme for a selected client.	2.M2 Produce a six-week gym-based exercise programme for a selected client, explaining how the client's needs and wants are reflected in the programme.	2.D2 Produce a comprehensive six-week gym-based exercise programme for a selected client, justifying the choice of exercises and implementation of the principles of training.

Learning outcome 3: Instruct and review a gym-based exercise session

<p>3.P4 Instruct and supervise a gym-based exercise session to meet a client's needs.</p>	<p>3.M3 Instruct and supervise a gym-based exercise session for a selected client to effectively meet the exercise programme plan.</p>	<p>3.D3 Evaluate a selected client's and own performance during the gym-based exercise session, justifying the need for improvements to meet the gym-based exercise programme plan.</p>
<p>3.P5 Review a client's performance in the gym-based exercise session, outlining their strengths and weaknesses.</p>	<p>3.M4 Assess a selected client's performance during a gym-based exercise session providing recommendations for improvements to meet the gym-based exercise programme plan.</p>	

Unit content

What needs to be learned

Learning outcome 1: Explore training principles and methods of gym-based exercise programmes

A1 Training principles for use in a gym-based training programme

- The principles of training:
 - FITT including frequency, intensity, time, type.
 - specificity
 - progressive overload
 - reversibility
 - adaptability
 - individuality
 - recovery time.
- Reasons for and implications of adapting, modifying and progressing the different training principles.

A2 Gym-based exercise training methods

- Know a range of gym-based exercise training methods:
 - cardiovascular including continuous, interval, fartlek.
 - resistance including single set training, circuit training, basic sets, Delorme and Watkins 10 RM system, Berger 6 RM system, Supersets.
 - power including plyometric.
 - flexibility and range of motion including static stretching (active and passive), ballistic stretching.
 - functional exercises and functional equipment including movement patterns, muscle actions, components of fitness for daily living.

A3 Gym-based exercise techniques

- Safe and effective technique for a range of gym-based exercises:
 - cardiovascular/conditioning machines
 - body weight exercises
 - fixed weight machines
 - free weights, e.g., dumbbells, kettlebells, slam balls, small equipment, e.g., mats, box steps, resistance bands

What needs to be learned

- functional exercises and functional equipment (exercises that address activities required for daily living)
- flexibility and range of motion exercises including static stretching, ballistic stretching.

Learning outcome 2: Plan a gym-based exercise programme

B1 Planning considerations for a gym-based exercise programme

- National guidelines for physical activity for different age groups including children and young people 5-18, adults 19-64, older adults 65+.
- Sourcing credible sources of information.
- Importance of evidence-based practice.
- Difference between programming for physical fitness and for health and wellbeing benefits.
- Appreciation and consideration of clients, different learning styles when planning programme delivery.
- Minimising risks.
- Components of health-related fitness:
 - aerobic endurance
 - body composition
 - flexibility
 - muscular endurance
 - muscular strength
 - speed.
- Components of skill-related fitness:
 - agility
 - balance
 - coordination
 - power
 - reaction time.
- Recognised national/international guidelines for improving different components of fitness.
- Communicating the health-related benefits of exercise to clients.
- Tailoring advice on the components of fitness for a healthy lifestyle according to individual clients.

What needs to be learned

- Technological advancements used to support the customer experience, increase physical activity levels, motivation and focus, e.g., wearable technology, pedometers, smartphone apps.

B2 Planning a gym-based exercise programme plan

- Plan safe and effective gym-based exercise programmes for a range of clients within scope of own practice, using appropriate equipment and methods.
- Consideration of relevant anatomy and physiology principles.
- SMART goals that are linked to the client's needs, wants and motivators.
- Safe and effective warmups, e.g. pulse raising activities, stretches/mobilisation activities.
- Range of suitable gym-based exercises for the client that:
 - uses appropriate fixed weight, free weight, body weight, resistance exercises that target the major muscle groups.
 - includes exercises that develop:
 - cardiovascular endurance
 - muscular endurance
 - muscular strength
 - flexibility
 - functional skills.
- Adherence to the principles of training.
- Consideration of client learning styles, likes, dislikes and needs.
- Use of full range of available equipment.
- Adaptations, progressions and regressions for each element of the programme.
- Ensuring muscle balance.
- Safe and effective cooldown, e.g., static stretching.
- Realistic timings and sequences for sessions.

Learning outcome 3: Instruct and review a gym-based exercise session [MY-TPR]

C1 Demonstrate gym-based exercise techniques

- Demonstrating safe and effective techniques:
 - warm-up
 - CV machines
 - body weight exercises
 - fixed weight machines
 - free weights, e.g., lifting, spotting and passing technique
 - functional exercises and use of equipment
 - flexibility and range of motion exercises
 - cool down.

C2 Instructing gym-based exercise

- Walking the gym floor, effectively supporting and interacting with different clients:
 - building rapport
 - friendly, non-threatening manner
 - timely, avoiding poorly timed interactions that could disrupt training/focus.
 - improving client technique
 - offering alternative exercise options to progress or regress depending on client needs
 - maintaining safety
 - awareness of the effect of speed of movement on posture, alignment and intensity
 - supporting the safe and enjoyable use of the fitness facility
 - using effective instructing and communication methods to cater for different learning styles, tailoring these to meet client needs.
 - manipulating principles of training to ensure progression according to individual needs.
- Appropriate methods to monitor intensity of exercise, e.g., the talk test, Borg scale RPE (rating of perceived exertion), heart rate monitoring, use of different heart rate zones.
- Alone working with minimal supervision and/or with colleagues as necessary.

What needs to be learned

- Monitoring the safety of exercise equipment use, including correct manual handling techniques and adherence to manufacturers' guidelines.
- Supporting the client to recognise and develop their intrinsic and extrinsic motivation to exercise.
- Complying with relevant legal and organisational responsibilities, e.g., health and safety at work, equality and diversity, safeguarding, data protection, hazard identification, safe working practices, ethics and professional conduct.
- Offering credible advice and guidance appropriate to own level of expertise to promote positive healthy lifestyle choices.
- Acting as an ambassador for the sector: leading by example, displaying positive health behaviours.

C3 Review a gym-based exercise session

- Reviewing and assessing the success of the programme in supporting clients' physical and psychological needs, e.g., questionnaire, formal discussion (focus groups), informal conversation (at the end of the session), online survey (survey monkey), straw poll (show of hands).
- Assessing client understanding of continuing with the exercise programme with and without direct supervision.
- Feedback sharing with clients to encourage and improve performance.
- Additional/alternative use of facilities suggestions depending on client interests.
- Regular session/programme reviews to ascertain how well the programme is meeting client needs.
- Share ideas with team members/colleagues.
- Be a buddy/mentor.
- Reflecting and evaluating planned programmes to ensure the physical and psychological needs of the individual are being met.
- Appraisal of participant performance during the session/s.
- Assessing the appropriateness of the session content in relation to the user group and environment.
- Proposing changes/adaptations based on participant performance.

C4 Review own performance in relation to a gym-based exercise programme

- Appraising personal performance in relation to the session/programme:
 - evaluating and reflect on own performance in supporting clients in their exercise programme.

What needs to be learned

- suggesting changes/adaptations to the planned programme based on the evaluation of personal performance.
- evaluating personal management of client health, safety and welfare.
- Seeking support from colleagues to improve professional practice:
 - receiving feedback/mentoring from colleagues on own performance
 - working on areas for development identified, e.g., gap analysis, personal development plan, accessing industry recognised CPD.

Essential information for tutors and assessors

Employer involvement

This unit would benefit from employer involvement in the form of:

- guest speakers
- design/ideas to contribute to unit assignment/case study/project materials.
- work experience
- support from local business staff as mentor.

Essential resources

For this unit, students will need:

- gym equipment
- recording equipment, such as a video camera, a tablet, a voice recorder
- a range of field fitness testing and health screening equipment
- normative data for interpretation of test results

suitable exercise facilities and equipment, including a gym with cardiovascular equipment, fixed resistance machines and free weights.

Transferable skills

Managing Yourself	Effective Learning	Interpersonal Skills	Solving Problems
MY – TPR *	EL – MOL	IS – WC	SP – CT
MY – PS&R	EL – CL	IS – V&NC	SP – PS
MY – COP	EL – SRS	IS – T	SP – C&I
MY – PGS	EL – PRS	IS – C&SI	

Table key

*	Signposted as part of learning. Requires additional assessment for student to achieve this TS
blank	TS not embedded or signposted in unit

Sustainability skills

Elements of the following UN Sustainability Development Goals will be covered in completing this unit.

Goal 3: Good health and wellbeing

Goal 4: Quality education

Goal 10: Reduce inequalities.

Assessment

This unit is internally assessed. To pass this unit, the evidence that students present for assessment must demonstrate that they have met the required standard specified in the learning outcomes and assessment criteria.

The assessment for this unit should be set in a specific organisational context, it should draw on learning from the unit and be designed in a way that enables students to meet all the assessment criteria.

Mandatory evidence requirements are given below- centres may adapt surrounding contexts but must ensure that evidence is produced as stipulated. An indicative form of assessment is provided in the accompanying sample assessment material.

Mandatory evidence requirements

In order to meet the targeted skills and behaviours for the mapped standards (IfATE and CIMSPA standards), the student will need to carry out practical assessments to demonstrate their ability in delivering a gym session with a client. Audio visual footage together with an observation record will be required as mandatory evidence of students completing these skills. Hard evidence is required in the form of audio-visual footage in order for Pearson to carry out external quality assurance checks.

Essential information for assessment decisions

Assessment criteria C.P4 and C.M3 must comply with the following practical assessment requirements:

CIMSPA stipulates practical assessment guidance that must be adhered to in order to comply with the professional body's endorsement. CIMSPA states that one of the main requests they receive from employers is that emphasis is needed on the importance for real-life assessment to be included in the CIMSPA Professional Standards. Employers have stipulated that all practical assessment must:

- be conducted in a real-world environment. This, where possible, should be in the workplace 'on the job' at work, or in a situation that is as close as possible to this, in order to replicate a working environment. For example, where appropriate an acceptable scenario is that you could use a learner from a different cohort as a client for the practical assessment. This can also be covered within a work placement.
- be conducted with 'real clients/participants' and not with peers.

The real client/participant must not:

- work at the same facility as the learners
- be related to the candidate, i.e., a spouse, partner, stepparent, brother or sister, etc.
- be enrolled on the same qualification as the trainee at the same time
- be a close friend.

There are situations where using a real client/participant is untenable. If there are circumstances where real clients/participants should not be used, this should be agreed with the awarding organisation, and evidence provided if a CIMSPA QA visit was to be scheduled.

Learning outcome 1

For distinction standard, students will:

- evaluate all the principles of training when planning their gym-based exercise programme – including FITT and SPORT principles. For each, they clearly explain the impact these principles have on what they plan and the way in which they will plan the training. Students evaluate different training methods that could be used during their gym-based exercise programme including cardiovascular, resistance and flexibility based training methods. Students will show a detailed understanding of these methods by clearly explaining the impact each will have on the client's ability to achieve their goals. Students will also provide clear links between training principles and training methods, clearly showing the application of the relevant principles for each training method and activity for optimum results.

For merit standard, students will:

- explain most of the principles of training in detail when planning and delivering their gym-based exercise programme – including FITT and SPORT principles. They explain the impact that each of the principles have on what they plan and the way in which they plan the training. Students explain some of the various training methods that could be used during their gym-based exercise programme. Students should show a good understanding of these methods, by explaining the impact each will have on the client's ability to achieve their goals. Students will also explain the link between training principles and training methods, showing the linkage between the relevant principles for each training method and activity for optimum results.

For pass standard, students will:

- outline some of the principles of training that need to be considered when planning and delivering their gym-based exercise programme – including FITT and SPORT principles. They provide an outline of the impact these principles have on what they plan and the way in which they plan the training. Students also outline some of the various training methods that could be used during their gym-based exercise programme. Students outline which one/s would be most suitable to support client likes, needs and wants.

Learning outcome 2

For distinction standard, students will:

- plan a detailed and well-structured six-week gym-based exercise programme based on the health screenings and fitness test of a selected client. The plan must include all key areas necessary for effective exercise, fully considering the client's SMART goals, learning styles, likes and dislikes. They plan safe and fully effective warm-ups, an extensive range of relevant exercises and/or use of equipment to comprehensively develop endurance, strength and flexibility. They also effectively plan stretching exercises for cool down. They fully justify reasons for their choices and make contingency plans for possible changes to the exercise regime for the client. Their plan clearly shows adherence to principles of training and includes accurate, realist timings and sequences for each session.

For merit standard, students will:

- plan a detailed six-week gym-based exercise programme based on the health screenings and fitness test of a selected client. The plan must include most of the key areas necessary for effective exercise, considering the client's SMART goals, learning styles, likes and dislikes. They plan safe and mostly effective warm-ups, a range of relevant exercises and/or use of equipment to develop endurance, strength and flexibility. They also give detail of some stretching exercises for cool down. They give reasons for most of their choices. Their plan shows adherence to most of the principles of training and includes some realistic timings and sequences for each session.

For pass standard, students will:

- plan an outline six-week gym-based exercise programme based on the health screenings and fitness test of a selected client. The plan will include some key areas necessary for exercise considering the client's needs. They plan safe warm ups, some relevant exercises and/or use of equipment to develop at least one of the following: endurance, strength and flexibility. They plan at least one stretching exercises for cool down. Their plan shows some adherence to the principles of training but may not include timings and sequences for each session.

Learning outcome 3

For distinction standard, students will:

- confidently deliver and supervise a gym-based session safely. They fully comply with relevant legal and organisational responsibilities. Students confidently build rapport by consistently interacting with the selected client at the right times, in a friendly and non-threatening manner. They consistently monitor, support and provide credible advice to the selected client and others when necessary. They confidently provide relevant and credible advice on how to improve techniques, posture, alignment, intensity and promote healthy lifestyles. They consistently offer alternative exercise options to progress or regress depending on their client's needs. They tailor their instruction and communication methods to cater to different learning styles of their selected and other clients' needs.
- confidently conduct an intensive review of the selected client's gym-based experience. They will obtain comprehensive feedback from their selected client by using one or more of the following: face-to-face formal or informal discussion, questionnaires. They use the review session to coherently discuss how the client could improve by addressing any weaknesses. They use this information to amend or develop a detailed and well-structured programme for a further six weeks, which includes additional or alternative use of facilities to fully enhance the physical and psychological needs of the selected client.
- reflect on their own performance when supervising a gym-based session. Students use feedback from colleagues and others as well as their own reflection to fully evaluate their supervision of the selected client and others during a gym-based session. They provide detailed notes on their strengths and weaknesses, using actual examples from their gym-based session to support their evidence. They then address their weaknesses by creating a gap analysis or a personal development plan.

For merit standard, students will:

- supervise a gym-based session safely, showing some confidence. They comply with relevant legal and organisational responsibilities. Students build rapport by interacting with the selected client most of the time, in a friendly and non-threatening manner. Their interactions with clients may not always be timely. They monitor, support and provide credible advice to the selected client and others where the need arises most of the time. They advise on at least three of the following: improvements to techniques, posture, alignment, intensity, healthy lifestyle choices. They offer

alternative exercise options to progress or regress, most of the time, depending on their client's needs. They tailor their instruction and communication methods to cater to the different learning styles of their selected and other clients' needs most of the time.

- conduct a review of the selected client's gym-based experience. They obtain detailed feedback from their selected client by using face-to-face formal or informal discussion and/or questionnaires. They use the review session to discuss how the client could improve by addressing most of the weaknesses. They use this information to amend or develop a programme for a further six weeks, which includes some additional or alternative use of facilities to enhance the physical and psychological needs of the selected client.

For pass standard, students will:

Competently instruct and supervise a gym-based exercise session that includes a minimums of :

- Three Cardiovascular
- Three Body weight
- Four resistance machine lifts
- Four Free weight lifts
- The Range of options that can be included are shown below:

Options of exercises are shown below:

- A minimum of three Cardiovascular equipment from the following options:
 - upright cycle
 - recumbent cycle
 - treadmill
 - stepper
 - rowing machine
 - elliptical trainer
 - Cross trainer

A minimum of four Resistance machine exercises	A minimum of four Free weight exercise	A minimum of 3 Body weight exercises
Seated chest press (neutral grip)	Front raise (DB)	NA
Seated row (low pulley) Seated row (neutral grip)	Single arm row Bent arm pullover (DB)	NA
Shoulder press	Shoulder press (DB) Lateral raise (DB) Upright row (BB)	NA
Lat pull down (in front of chest) Assisted pull up	Chins	NA
Bench press Seated chest press (BB grip) Pec dec	Bench press Flyes (DB)	Press up
Seated row (BB grip)	Prone flye (DB)	NA
Triceps pushdown (high pulley) Tricep press	Supine Triceps press (BB) Single arm Triceps press (DB)	Press up
Biceps curl (low pulley) Seated bicep curl	Biceps curl (BB) (DB)	
Leg press Total hip	Lunge (BB, DB optional) Dead lift (BB) (DB)	Lunge
Seated adductor Total hip		
Seated abductor Total hip		
Seated knee extension Leg press	Lunge Dead lift (BB) (DB) Squat (DB) (BB)	Lunge Squat
Lying thigh curl Seated thigh curl		
Abdominal machine	Abdominal curl	
Lower back machine	Dead lift (BB) (DB)	Back raise

- Carry out a review of the client's performance when taking part in a gym-based exercise session. They will confirm what exercises the client performed well in and which areas they need to improve upon in order to meet their fitness goals.

11 Appeals

Centres must have a policy for dealing with appeals from students. Appeals may relate to assessment decisions being incorrect or assessment not being conducted fairly. The first step in such a policy is a consideration of the evidence by a Lead Internal Verifier or other member of the programme team. The assessment plan should allow time for potential appeals after students have been given assessment decisions.

Centres must document all students' appeals and their resolutions. Further information on the appeals process can be found in the document Internal assessment in vocational qualifications: Reviews and appeals policy, available on our website.

12 Understanding the qualification grade

Awarding and reporting for the qualification

This section explains the rules that we apply in providing an overall qualification grade for each student. The final grade awarded for a qualification represents a holistic performance across all of the qualification. As the qualification grade is an aggregate of the total performance, there is some element of compensation in that a higher performance in some units will be balanced by a lower outcome in others.

The Calculation of qualification grade table, which appears later in this section, shows the minimum thresholds for calculating these grades. The table will be kept under review over the lifetime of the qualification.

Students who do not meet the minimum requirements for a qualification grade to be awarded will be recorded as Unclassified (U) and will not be certificated. They may receive a Notification of Performance for individual units. Our Information Manual gives full details.

Points available for internally-assessed units

The table below shows the number of points available for internally-assessed units. For each internally-assessed unit, points are allocated depending on the grade awarded.

	60 GLH	120 GLH
U	0	0
Pass	16	32
Merit	24	48
Distinction	32	64

Claiming the qualification grade

Subject to eligibility, we will automatically calculate the qualification grade for your students when the internally assessed unit grades are submitted, and the qualification claim is made. Students will be awarded qualification grades for achieving the sufficient number of points within the ranges shown in the relevant calculation of qualification grade table for the cohort.

Calculation of qualification grade table

Diploma	
Grade	Points threshold
PP	96
MP	112
MM	128
DM	152
DD	176

The table is subject to review over the lifetime of the qualification.
The most up-to-date version will be issued on our website.

Examples of grade calculations based on table applicable to registrations from September 2025

Example 1: Achievement of a Diploma with a PP grade, where a student has achieved a pass in all units.

Unit	GLH	Type	Grade	Points
1	120	Internal	Pass	32
2	60	Internal	Pass	16
3	60	Internal	Pass	16
4	120	Internal	Pass	32
	360		PP	96

The learner has sufficient points for a PP grade.

Example 2: Achievement of a Diploma with a MM grade

Unit	GLH	Type	Grade	Points
1	120	Internal	Merit	48
2	60	Internal	Merit	24
3	60	Internal	Merit	24
4	120	Internal	Merit	48
	360		MM	144

The learner has sufficient points for a MM grade.

Example 3: Achievement of a Diploma with a MP grade

Unit	GLH	Type	Grade	Points
1	120	Internal	Pass	24
2	60	Internal	Pass	16
3	60	Internal	Merit	24
4	120	Internal	Merit	48
	360		MP	112

The learner has sufficient points for an MP grade.

Example 4: Achievement of a Diploma with a DD grade

Unit	GLH	Type	Grade	Points
1	120	Internal	Distinction	64
2	60	Internal	Distinction	32
3	60	Internal	Distinction	32
4	120	Internal	Distinction	64
	360		DD	192

The learner has sufficient points for an DD grade

Example 5: Achievement of a Diploma with an Unclassified result. In this case the student has achieved sufficient points for an MP grade but receives a U as they have not passed one unit.

Unit	GLH	Type	Grade	Points
1	120	Internal	M	48
2	60	Internal	U	0
3	60	Internal	P	16
4	120	Internal	M	48
	360		U	112

13 Malpractice

Dealing with malpractice in assessment

Malpractice refers to acts that undermine the integrity and validity of assessment, the certification of qualifications and/or may damage the authority of those responsible for delivering the assessment and certification.

Pearson does not tolerate actual or attempted actions of malpractice by students, centre staff or centres in connection with Pearson qualifications. Pearson may impose penalties and/or sanctions on students, centre staff or centres where malpractice or attempted malpractice has been proven.

Malpractice may occur or be suspected in relation to any unit or type of assessment within a qualification. For further details on malpractice and advice on preventing malpractice by students, please see Pearson's Centre Guidance: Dealing with Malpractice available on our website.

Centres are required to take steps to prevent malpractice and to investigate instances of suspected malpractice. Students must be given information that explains what malpractice is for internal assessment and how suspected incidents will be dealt with by the centre. The Centre Guidance: Dealing with Malpractice document gives full information on the actions we expect you to take.

Pearson may conduct investigations if we believe a centre is failing to conduct internal assessment according to our policies. The above document gives further information and examples. It details the penalties and sanctions that may be imposed.

In the interests of students and centre staff, centres need to respond effectively and openly to all requests relating to an investigation into an incident of suspected malpractice.

Student malpractice

The head of centre is required to report incidents of suspected student malpractice that occur during Pearson qualifications. We ask centres to complete JCQ Form M1 (www.jcq.org.uk/malpractice) and email it with any accompanying documents (signed statements from the student, invigilator, copies of evidence, etc) to the Investigations Processing team at candidatemalpractice@pearson.com. The responsibility for determining appropriate sanctions or penalties to be imposed on students lies with Pearson.

Students must be informed at the earliest opportunity of the specific allegation and the centre's malpractice policy, including the right of appeal. Students found guilty of malpractice may be disqualified from the qualification for which they have been entered with Pearson.

Failure to report malpractice constitutes staff or centre malpractice.

Teacher/centre malpractice

The head of centre is required to inform Pearson's Investigations team of any incident of suspected malpractice (which includes maladministration) by centre staff before any investigation is undertaken. The head of centre is requested to inform the Investigations team by submitting a JCQ M2 Form (downloadable from www.jcq.org.uk/malpractice) with supporting documentation to pqsmalpractice@pearson.com. Where Pearson receives allegations of malpractice from other sources (for example Pearson staff, anonymous informants), the Investigations team will conduct the investigation directly or may ask the head of centre to assist.

Pearson reserves the right in cases of suspected malpractice to withhold the issuing of results/certificates while an investigation is in progress. Depending on the outcome of the investigation, results and/or certificates may not be released, or they may be withheld.

You should be aware that Pearson may need to suspend certification when undertaking investigations, audits and quality assurances processes. You will be notified within a reasonable period of time if this occurs.

Sanctions and appeals

Where malpractice is proven, we may impose sanctions or penalties, such as:

- mark reduction for affected external assessments.
- disqualification from the qualification
- debarment from registration for Pearson qualifications for a period of time.

If we are concerned about your centre's quality procedures, we may impose sanctions such as:

- working with centres to create an improvement action plan
- requiring staff members to receive further training.
- placing temporary suspensions on certification of students
- placing temporary suspensions on registration of students
- debarring staff members or the centre from delivering Pearson qualifications

- suspending or withdrawing centre approval status.

The centre will be notified if any of these apply.

Pearson has established procedures for considering appeals against penalties and sanctions arising from malpractice. Appeals against a decision made by Pearson will normally be accepted only from the head of centre (on behalf of students and/or members or staff) and from individual members (in respect of a decision taken against them personally). Further information on appeals can be found in the JCQ Appeals booklet (www.jcq.org.uk/exams-office/appeals).

14 Further information and publications

- Edexcel, BTEC and Pearson Work Based Learning contact details: qualifications.pearson.com/en/contact-us.html.
- Books, software and online resources for UK schools and colleges: www.pearsonschoolsandfecolleges.co.uk.
- Our publications catalogue lists all the material available to support our qualifications. To access the catalogue and order publications, please visit our website.

Further documents that support the information in this specification:

- Access arrangements and reasonable adjustments (JCQ)
- A guide to the special consideration process (JCQ)
- Collaborative and consortium arrangements for the delivery of vocational qualifications policy (Pearson)
- UK information manual (updated annually and available in hard copy) or Entries and information manual (available online) (Pearson).
- Distance learning and assessment policy (Pearson)

15 Glossary

Part A – General terminology used in specification

Term	Description
Level	Units and qualifications have a level assigned to them. The level assigned is informed by the level descriptors defined by Ofqual, the qualifications regulator.
Guided learning hours (GLH)	This indicates the number of hours of activities that directly or immediately involve tutors and assessors in teaching, supervising, and invigilating students, for example lectures, tutorials, online instruction and supervised study. Units may vary in size.
Total qualification time (TQT)	This indicates the total number of hours that a typical student will take to complete the qualification. This is in terms of both guided learning hours but also unguided learning, for example private study, time spent in the workplace to master skills.
Learning outcomes	The learning outcomes of a unit set out what a student knows, understands or is able to do as the result of a process of learning.
Assessment criteria	The assessment criteria specify the standard the student is required to meet to achieve a learning outcome.
Unit content	This section sets out the required teaching content of the unit and specifies the knowledge, skills and understanding required for achievement of the unit. It enables centres to design and deliver a programme of learning that will enable students to achieve each learning outcome and to meet the standard determined by the assessment criteria.
Summative assessment	Assessment that takes place after the programme of learning has taken place.
Valid assessment	The assessment assesses the skills or knowledge/understanding in the most sensible, direct way to measure what it is intended to measure.

Term	Description
Reliable assessment	The assessment is consistent, and the agreed approach delivers the correct results on different days for the same students and different cohorts of students.

Appendix 1

Transferable skills framework

Transferable Skills Framework – Performance Indicators and Indicative content for teaching and learning - Version 2.0

1. Managing Yourself	Students understand and work within their role, responsibilities and expected standards of behaviour. They can manage their time and resources, meet deadlines, and show that they can take accountability for their actions. They can identify and use their personal strengths to adapt to challenges and demonstrate resilience when dealing with changing situations. They can gather relevant information to explore their career options and gain work related experience. They can set SMART goals, monitor their progress, and actively seek feedback to improve their own performance.		
Skill Cluster	Performance Descriptors	Indicative content for teaching and learning	
MY-TPR	Taking Personal Responsibility	Demonstrates understanding of their role and responsibilities and the expected standards of behaviour.	<ul style="list-style-type: none"> Responsibilities and standard of behaviours relevant to roles, e.g. as a student or on work placement/experience; roles relevant to their sector Types of codes of conduct and ways of working in different contexts such as college/school/work placement/experience. Examples include professional code of conduct; behaviour policy; malpractice and plagiarism (responsible use of AI); social media use; privacy and confidentiality.
		Demonstrates compliance with codes of conduct and ways of working.	
		Makes use of available resources to complete tasks.	
		Manages their time to meet deadlines and the required standards.	

		Demonstrates accountability for their decisions or actions.	<ul style="list-style-type: none"> • How to plan resource use, including identifying resource needs and arranging timely access to resources, following sustainability practices • Importance of achievable time management including health and well-being and setting realistic goals • Different time management strategies, e.g. 'To do' lists; 'Urgency vs Importance' prioritisation; action planning; techniques to deal with procrastination. • Definition of accountability and ways to demonstrate accountability, fulfilling responsibilities for their role; taking responsibility for mistakes; not blaming others; being open to feedback
MY-PS&R	Personal Strengths and Resilience	Identifies own personal strengths and demonstrates the ability to use these in relevant areas.	<ul style="list-style-type: none"> • Identifying personal strengths and attributes, e.g., personal skills audit; personality tests; feedback from tutors and peers; analysing past successes • Ways of utilising personal strengths, e.g. seeking out projects and activities that will use their strengths; observing others with the same strengths. • Meaning of adaptability and behaviours that demonstrate adaptability. • Tips for adapting own mindset e.g., proactively monitoring for signs of change; seeking to understand reasons for changes; finding solutions to respond to changes; seeking support from others
		Demonstrates the ability to adapt own mindset and actions to changing situations or factors.	
		Uses challenges as learning opportunities.	

			<ul style="list-style-type: none"> • Meaning of resilience, including emphasis on bouncing back better and thriving from a challenge or stressful situation • Behaviours and skills that support resilience, e.g., emotional intelligence; positivity; problem-solving skills; self-awareness, etc. • How to learn from challenges, including focusing on the facts of the situation/challenge, not feelings; looking for insights from the experience, e.g., new knowledge gained from realising a mistake
MY-COP	Career Orientation Planning	Undertakes research to understand the types of roles in the sector in which they could work.	<ul style="list-style-type: none"> • Secondary sources of information on different job roles in relevant sector, (including job activities, progression opportunities, skills needed and pay expectations) e.g., xxx (writers to insert name of sector and give examples of reliable sources for the sector) • Primary sources of information, e.g., career advisor, employer visits, etc. • Understanding career interests and motivations – taking a career quiz; thinking about what they want from their careers, e.g., pay vs. Purpose; intrinsic and extrinsic motivations. • How to identify areas for development, e.g., personal skills audit • How to create and maintain a professional profile including creating an online professional profile such as LinkedIn or
		Reviews own career plans against personal strengths and identifies areas for development to support progression into selected careers.	
		Takes part in sector-related experiences to support career planning.	

			<p>online professional portfolios; writing a CV (purpose, layouts and information included, writing tips); video resumes</p> <ul style="list-style-type: none"> • Identifying the risks involved with social media and future employment. • Different ways of gaining sector experience, e.g. work experience, summer internships, volunteering • Finding sector experience opportunities, e.g., asking tutors, career advisor or parents/family; speaking to local businesses; social media platforms e.g., LinkedIn
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MY-PGS	Personal Goal Setting	Sets SMART goals using relevant evidence and information.	<ul style="list-style-type: none"> • Meaning of SMART goals (Specific, Measurable, Achievable, Realistic/ Relevant*, Time Constrained) • Sources of information to support goal setting, e.g. career aspirations; skills audit; tutor, parents, career advisor • Writing an action plan – template to include sections for identified goals, actions to achieve, timescale to complete actions, resources needed and success criteria. • Monitoring progress against goals using the action plan • Seeking and receiving feedback: choose who to ask; agree focus of feedback; prepare relevant questions; schedule time and place for feedback; take notes; reflect and identify improvements. • *Sometimes R is referred to as Relevant – only use one
		Reviews progress against goals and identifies realistic areas for improvement.	
		Seeks feedback from others to improve own performance.	

2 Effective Learning		Students can work independently and manage themselves to stay on task. They can identify and apply lessons learned from past activities to future ones and can act proactively to improve their own learning through feedback and monitoring their own performance. They can carry out research using primary and secondary data sources and can analyse and interpret data to draw informed and reasoned conclusions.	
Skill cluster		Performance Descriptors	Indicative content for teaching and learning
EL-MOL	Managing Own Learning	Maintains a focus on own learning objectives when completing a task.	<ul style="list-style-type: none"> • Tips for staying focused, e.g., minimising distractions; breaking down big tasks into smaller parts; using a To Do List; SMART goal setting; • Meaning of independent learning i.e., students having ownership of their learning; and what it is not, i.e. working without teacher supervision or having less guidance • Becoming a successful independent student: organisation of time and resources; metacognitive skills; understanding own learning styles; self-regulation; motivation and commitment • How to review outcomes (successful and unsuccessful) including, getting feedback from others; identifying what worked/went wrong; reflecting on how the wrong decision was taken and what could have been done differently
		Demonstrates the ability to work independently to complete tasks.	
		Reviews and applies learning from successful and unsuccessful outcomes to be effective in subsequent tasks.	
EL-CL	Continuous Learning	Engages with others to obtain feedback about own learning progress.	<ul style="list-style-type: none"> • What it means to have a 'growth mindset' and importance of lifelong learning • Meaning and importance of constructive feedback • How to handle feedback positively, including active listening; asking questions to clarify, etc.
		Responds positively to feedback on learning progress from others.	
		Monitors own learning and	

		performance over the short and medium term.	<ul style="list-style-type: none"> • Meaning of emotional intelligence and how it helps in managing emotions when receiving constructive feedback. • Strategies for monitoring own learning progress in the short-term, e.g., Red, Amber, Green rating content; 'I Can' statements/rubrics; self-reflection; active participation in formative assessments. • Strategies for monitoring own learning progress in the long term, e.g. use of online tests; sample assessments, past papers

EL-SRS	Secondary Research Skills	Define the research topic or question	<ul style="list-style-type: none"> • Sources of relevant secondary data • Evaluating the quality and reliability of secondary data, i.e. checking the source (who collected the data, when and how and for what purpose – author credibility and reliability of methodology); relevance, currency and consistency with other sources; accuracy; ethics – fairness, integrity and dignity • Analysing data including qualitative and/or quantitative analysis techniques and drawing conclusions based on research topic, question or hypothesis; support conclusions with reasoned arguments. • Recognised referencing and citation styles e.g., Harvard style
		Uses valid and reliable sources to collate secondary data.	
		Interprets secondary data and draw valid conclusions.	
		Produces a reference list and cites sources appropriately.	
EL-PRS	Primary Research Skills	Define the research topic or question	<ul style="list-style-type: none"> • Research design – deciding on data collection and sampling methods considering cost, time, research purpose and generalisability • Gathering and measuring data following sector code of practices e.g., protocols, informed consent; ethical clearance process • Analysing data using qualitative and/or quantitative analysis techniques; supporting decision-making; support conclusions with reasoned arguments
		Carries out primary data collection using appropriate and ethical research methodology.	
		Interprets primary data to draw valid conclusions.	

3 Interpersonal Skills		Students can produce clear written communications that are suitable in format, language and tone for the intended purpose and audience. They can verbally express their thoughts and ideas clearly, adjusting their tone and style to meet the purpose and audience needs, and can listen to, understand, and respond to others' accordingly/appropriately. They can work effectively as a member of a team to achieve a common goal and are able demonstrate a respectful and inclusive approach in their interactions with others.	
Skill Cluster		Performance Descriptors	Indicative content for teaching and learning
IS-WC	Written Communications	Produces formal written communication using appropriate language and tone to suit purpose.	<ul style="list-style-type: none"> • Difference between formal and informal communications • Formal written communication including business letters and emails, reports, technical documents, presentations. • Use of language, including correct grammar, spelling, and punctuation; appropriate use of technical language • Acceptable writing formats for relevant types of communication, including reports, presentations, letters, business emails
IS-V&NC	Verbal and Non-Verbal Communications	Uses verbal communication skills confidently to suit audience and purpose.	<ul style="list-style-type: none"> • Elements of verbal communication including pitch, tone, speed, volume • Use of body language, gestures, facial expressions etc. • Difference between formal and informal language and when suitable • Different characteristics of audience to consider, e.g., age, level of knowledge or experience, culture, personal interests, accessibility needs. • How to deliver a presentation, including personal introduction, topic introduction, main body and conclusion
		Uses body language and non-verbal cues effectively	
		Uses active listening skills and checks understanding when interacting with others.	

			<ul style="list-style-type: none"> • Ways of building rapport with an audience, e.g., use of eye contact; humour; storytelling; voice modulation and pacing; mirroring • Use of visual aids, e.g., presentation slides, artefacts, leaflets, cards, etc. • Meaning of active listening and how to demonstrate active listening, e.g., maintaining eye contact; providing verbal and non-verbal feedback. • Checking understanding, including asking questions to clarify and confirm understanding; identifying the key information to take-away, etc.
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IS-T	Teamwork	Engages positively with team members to understand shared goals and own roles and responsibilities.	<ul style="list-style-type: none"> • Meaning of teamwork and the characteristics of an effective team, including clear goals and roles, balance of skills and abilities, good communication, openness and trust; leadership skills • How to be a responsible team member, including carrying out responsibilities in a timely way (being reliable); listening to others, sharing ideas, etc • Inclusive and respectful behaviours as a team member e.g., politeness, showing consideration for others, impartial behaviour. • How to provide constructive feedback including framing feedback, balancing positive and negative, being specific, distinguishing the person from their actions; identifying the key learning take-aways
		Respectfully consider the views of team members and shows courtesy and fairness.	
		Completes activities in line with agreed role and responsibilities.	
		Provide support to team members to achieve shared goals.	
IS-C&SI	Cultural and Social Intelligence	Demonstrates awareness of cultural and social biases	<ul style="list-style-type: none"> • Understanding cultural and social biases e.g., socioeconomical status, language, race, ethnicity, religion, sexuality, gender, ageism, generalised beauty standards; stereotypes and assumed behaviours. • Meaning of unconscious bias; understanding own positive and negative biases • Types of diversity - differences such as race, ethnicity, gender, gender identity, sexual orientation, neurodiversity, social class, physical ability, religious or ethical values, political beliefs; economic background
		Demonstrates diversity, tolerance and inclusivity values in their approach to working with others.	

			<ul style="list-style-type: none">• Inclusive and respectful behaviours, including supporting views and beliefs that may differ from their own; negotiating and balancing different views to reach workable solutions; observing and learning from others
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4 Solving Problems		Students can clearly define a problem and use meaningful information gathering and focused techniques to collect information to address the problem. They can evaluate the credibility of sources of information and select, analyse and synthesise data to propose and justify solutions. They can develop, test and refine new ideas, or build on existing ideas to find innovative and creative solutions.	
Skill Cluster		Performance Descriptors	Indicative content for teaching and learning
SP-CT	Critical Thinking	Demonstrates understanding of the problem or issue to be addressed	<ul style="list-style-type: none"> • Use of meaningful questioning to understand the problem/issue. • Determining sources of information according to problem/issue and collating the information considering diversity of sources • Checking credibility of information – currency, reliability, relevance, usefulness; inferences that have not been critically considered. • Analysing and synthesising information to bring together a range of evidence. • Use reasoning to judge the strength or weakness of an argument; considering different perspectives. • Challenging own biases and assumptions e.g., anchoring bias, over confidence bias; stereotypes e.g., gender, cultural; assumptions and unconscious biases • Presenting structured reasoning to support conclusions
		Gather relevant information from different sources.	
		Assesses the credibility and relevance of information	
		Interprets and evaluates information to present reasoned conclusions	
SP-PS	Problem Solving	Presents a clear definition of the problem	

		Gathers relevant information to formulate proposed solutions.	<ul style="list-style-type: none"> • Problem analysis including fact-finding, informed questioning to explore the scope and impact of problem. • Understand how to write an effective problem statement. • The problem-solving process and the activities involved at each stage. • Assessing the benefits and limitations of options and solutions; making judgements on the quality of solutions • Reasoning to justify choice of solutions. • Ways to present solutions e.g., slide presentation; report; poster; artefacts.
		Selects relevant and significant information to formulate proposed solutions.	
		Identifies negative and positive implications of proposed solutions.	
		Presents and justifies selected solutions to problems.	

SP-C&I	Creativity and Innovation	Identifies new and relevant ideas to help solve a problem.	<ul style="list-style-type: none"> • Using creative tools e.g., Problem stories, alternate sectors; mind mapping; learning new methods and procedures; risk taking, overcoming fear of failure. • Adapting processes in response to findings/feedback; emotional resilience to feedback • Deferring/suspend judgement of others, ideas until fully researched/explored.
		Refines ideas into workable solutions based on test results and/or feedback.	

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