

**Pearson**  
**BTEC Level 5 Award in**  
**Principles of Managing the**  
**Learning and Development**  
**Function (QCF)**

BTEC Professional qualifications

**Specification**

First teaching August 2014

Pearson Education Limited is one of the UK's largest awarding organisations, offering academic and vocational qualifications and testing to schools, colleges, employers and other places of learning, both in the UK and internationally. Qualifications offered include GCSE, AS and A Level, NVQ and our BTEC suite of vocational qualifications, ranging from Entry Level to BTEC Higher National Diplomas. Pearson Education Limited administers BTEC qualifications.

Through initiatives such as onscreen marking and administration, Pearson is leading the way in using technology to modernise educational assessment, and to support teachers and learners.

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## **BTEC Professional qualification titles covered by this specification**

Pearson BTEC Level 5 Award In Principles of Managing the Learning and Development Function (QCF)

This qualification has been accredited to the Qualifications and Credit Framework (QCF) and is eligible for public funding as determined by the Department for Education (DfE) under Section 96.

The qualification title listed above features in the funding lists published annually by the DfE and the regularly updated website [www.education.gov.uk/](http://www.education.gov.uk/). The QCF Qualifications Accreditation Number (QAN) should be used by centres when they wish to seek public funding for their learners. Each unit within a qualification will also have a QCF unit code.

The QCF qualification and unit codes will appear on learners' final certification documentation.

The Qualification Accreditation Number for the qualification in this publication is:

Pearson BTEC Level 5 Award In Principles of Managing the Learning and Development Function (QCF) 601/1135/5

This qualification title will appear on learners' certificates. Learners need to be made aware of this when they are recruited by the centre and registered with Pearson.

# **Welcome to Pearson BTEC Level 5 Award in Principles of Managing the Learning and Development Function (QCF)**

We are delighted to introduce our new qualification, which will be available for teaching from August 2014. This qualification has been developed to meet the requirements of the QCF (Qualifications and Credit Framework).

## **Focusing on the Pearson BTEC Level 5 Award in Principles of Managing the Learning and Development Function (QCF)**

The Pearson BTEC Level 5 Award in Principles of Managing the Learning and Development Function (QCF) will enable learners to explore the challenges faced in managing learning solutions and aligning them to organisational goals. Learners will be able to prepare to meet those challenges through effective administration of the learning function including controlling a budget, effective project management, legal constraints, maintaining quality and a creating a robust evaluation process.

Target groups for this qualification include:

- senior learning and development managers responsible for delivering best practice approaches to learning which meet business objectives and generate organisational success
- experienced practitioners who have achieved a Level 4 qualification in learning and development and wish to develop further.

## **Straightforward to implement, teach and assess**

Implementing BTECs couldn't be easier. They are designed to easily fit into your curriculum and can be studied independently or alongside existing qualifications, to suit the interests and aspirations of learners. The clarity of assessment makes grading learner attainment simpler.

## **Engaging for everyone**

Learners of all abilities flourish when they can apply their own knowledge, skills and enthusiasm to a subject. BTEC qualifications make explicit the link between theoretical learning and the world of work by giving learners the opportunity to apply their research, skills and knowledge to work-related contexts and case studies. These applied and practical BTEC approaches give all learners the impetus they need to achieve and the skills they require for workplace or education progression.

## **Recognition**

BTECs are understood and recognised by a large number of organisations in a wide range of sectors. BTEC qualifications are developed with key industry representatives and Sector Skills Councils (SSC) to ensure that they meet employer and student needs

## **All you need to get started**

To help you off to a flying start, we've developed an enhanced specification that gives you all the information you need to start teaching BTEC. This includes:

- a framework of equivalencies, so you can see how this qualification compares with other Pearson vocational qualifications
- information on rules of combination, structures and quality assurance, so you can deliver the qualification with confidence
- explanations of the content's relationship with the learning outcomes
- guidance on assessment, and what the learner must produce to achieve the unit.

Don't forget that we're always here to offer curriculum and qualification updates, local training and network opportunities, advice, guidance and support.



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# What are BTEC Level 5 Professional qualifications?

BTEC Professional qualifications are qualifications at Level 4 to Level 8 in the Qualifications and Credit Framework (QCF) and are designed to provide professional work-related qualifications in a range of sectors. They give learners the knowledge, understanding and skills that they need to prepare for employment. The qualifications also provide career development opportunities for those already in work. Consequently they provide a course of study for full-time or part-time learners in schools, colleges and training centres.

BTEC Professional qualifications provide much of the underpinning knowledge and understanding for the National Occupational Standards for the sector, where these are appropriate. They are supported by the relevant Standards Setting Body (SSB) or Sector Skills Council (SSC). A number of BTEC Professional qualifications are recognised as the knowledge components of Apprenticeships Frameworks.

On successful completion of a BTEC Professional qualification, learners can progress to or within employment and/or continue their study in the same, or related vocational area.

The QCF is a framework which awards credit for qualifications and units and aims to present qualifications in a way that is easy to understand and measure. It enables learners to gain qualifications at their own pace along flexible routes.

There are three sizes of qualification in the QCF:

- Award (1 to 12 credits)
- Certificate (13 to 36 credits)
- Diploma (37 credits and above).

Every unit and qualification in the framework will have a credit value.

The credit value of a unit specifies the number of credits that will be awarded to a learner who has achieved the learning outcomes of the unit.

The credit value of a unit is based on:

- one credit for those learning outcomes achievable in 10 hours of learning
- learning time – defined as the time taken by learners at the level of the unit, on average, to complete the learning outcomes of the unit to the standard determined by the assessment criteria.

The credit value of the unit will remain constant in all contexts, regardless of the assessment method used for the qualification(s) to which it contributes.

Learning time should address all learning (including assessment) relevant to the learning outcomes, regardless of where, when and how the learning has taken place.

## **Pearson BTEC Level 5 Award**

The Pearson BTEC Level 5 Award provides an introduction to the skills, qualities and knowledge that may be required for employment in a particular vocational sector.

### **Key features of the Pearson BTEC Level 5 in Principles of Managing the Learning and Development Function**

The Pearson BTEC Level 5 in Principles of Managing the Learning and Development Function has developed to give learners the opportunity to:

- engage in learning that is relevant to them and which will provide opportunities to develop a range of skills and techniques in the Learning and Development Function, as well as developing their personal skills and attributes essential for successful performance in working life
- achieve a nationally recognised Level 5 vocationally-related qualification
- progress with their employment in a particular vocational sector
- progress to related general and/or vocational qualifications.
- develop their practice of the Learning and Development function, further

# Rules of combination

The rules of combination specify the credits that need to be achieved, through the completion of particular units, for the qualification to be awarded. All accredited qualifications within the QCF have rules of combination.

## **Rules of combination for the Pearson BTEC Level 5 Award In Principles of Managing the Learning and Development Function (QCF) qualification**

When combining units for a Pearson BTEC Level 5 Award In Principles of Managing the Learning and Development Function (QCF), it is the centre's responsibility to ensure that the following rules of combination are adhered to.

### **Pearson BTEC Level 5 Award In Principles of Managing the Learning and Development Function (QCF)**

- 1 Qualification credit value: a minimum of 12 credits.
- 2 Minimum credit to be achieved at, or above, the level of the qualification: 12 credits.
- 3 All credits must be achieved from the units listed in this specification.

## **Pearson BTEC Level 5 Award In Principles of Managing the Learning and Development Function (QCF)**

The Pearson BTEC Level 5 Award In Principles of Managing the Learning and Development Function (QCF) is a 12 credit and 50 guided learning hour (GLH) qualification that consists of one mandatory unit.

<b>Pearson BTEC Level 5 Award In Principles of Managing the Learning and Development Function (QCF)</b>			
<b>Unit</b>	<b>Mandatory units</b>	<b>Credit</b>	<b>Level</b>
1	Principles of Managing the Learning & Development Function	5	12

## Assessment

This qualification is assessed through an externally verified Portfolio of Evidence that consists of evidence gathered during the course of the learner's work.

To achieve a pass for the full qualification, the learner must achieve all the required units in the stated qualification structure. Each unit has specified learning outcomes and assessment criteria. To pass each unit the learner must:

- achieve **all** the specified learning outcomes
- satisfy **all** the assessment criteria by providing sufficient and valid evidence for each criterion
- prove that the evidence is their own.

The learner must have an assessment record that identifies the assessment criteria that have been met, and it should be cross-referenced to the evidence provided. The assessment record should include details of the type of evidence and the date of assessment. The unit specification or suitable centre documentation can be used to form an assessment record.

It is important that the evidence provided to meet the assessment criteria of the unit and learning outcomes is:

<b>Valid</b>	relevant to the standards for which competence is claimed
<b>Authentic</b>	produced by the learner
<b>Current</b>	sufficiently recent to create confidence that the same skill, understanding or knowledge persist at the time of the claim
<b>Reliable</b>	indicates that the learner can consistently perform at this level
<b>Sufficient</b>	fully meets the requirements of the standards.

### Learners can provide evidence of occupational competence from:

- **current practice** where evidence is generated from a current job role
- a **programme of development** where evidence comes from assessment opportunities built into a learning programme, whether at or away from the workplace. The evidence provided must meet the requirements of the Sector Skills council's assessment requirements/strategy.
- the **Recognition of Prior Learning (RPL)** where a learner can demonstrate that they can meet the assessment criteria within a unit through knowledge, understanding or skills they already possess without undertaking a course of development. They must submit sufficient, reliable, authentic and valid evidence for assessment. Evidence submitted based on RPL should provide confidence that the same level of skill/understanding/knowledge exists at the time of claim as existed at the time the evidence was produced. RPL is acceptable for accrediting a unit, several units, or a whole qualification.
- Further guidance is available in the policy document *Recognition of Prior Learning Policy and process*, available on the Edexcel website.
- a **combination** of these.

## **Assessment strategy/assessment requirements**

The assessment strategy and assessment requirements for this qualification have been included in *Annexe A*. These requirements have been developed by the Council for Administration in partnership with employers, training providers, awarding organisations and the regulatory authorities.

### **Types of evidence**

To achieve a unit, the learner must gather evidence that shows that they have met the required standard specified in the assessment criteria as well as the requirements of the Skills CFA assessment requirements/strategy. As stated in the assessment requirements/strategy, the evidence for this qualification can take a variety of forms as indicated below:

- direct observation of the learner's performance by their assessor (O)
- outcomes from oral or written questioning (Q&A)
- products of the learner's work (P)
- personal statements and/or reflective accounts (RA)
- outcomes from simulation (S) (please see guidance in the assessment strategy)
- professional discussion (PD)
- assignment, project/case studies (A)
- authentic statements/witness testimony (WT)
- expert witness testimony (EWT)
- evidence of Recognition of Prior Learning (RPL).

Learners can use the abbreviations for cross-referencing purposes in their portfolios.

Learners can also use one piece of evidence to prove their knowledge, skills and understanding across different assessment criteria and/or across different units. It is not necessary for learners to have each assessment criterion assessed separately. They should be encouraged to reference evidence to the relevant assessment criteria. Evidence must be available to the assessor, internal verifier and Pearson standards verifier.

### **Qualification grade**

Learners who achieve the minimum eligible credit value specified by the rule of combination will achieve the qualification at pass grade.

In the Pearson BTEC Level 5 Professional qualifications each unit has a credit value which specifies the number of credits that will be awarded to a learner who has achieved the learning outcomes of the unit. This has been based on:

- one credit for those learning outcomes achievable in 10 hours of learning time
- learning time being defined as the time taken by learners at the level of the unit, on average, to complete the learning outcomes of the unit to the standard determined by the assessment criteria
- the credit value of the unit remaining constant regardless of the method of assessment used or the qualification to which it contributes.

# Quality assurance of centres

Pearson BTEC Level 4-7 qualifications provide a flexible structure for learners enabling programmes of varying credits and combining different levels. For the purposes of quality assurance, all individual qualifications and units are considered as a whole.

Centres delivering the Pearson BTEC Level 4-7 qualifications must be committed to ensuring the quality of the units and qualifications they deliver, through effective standardisation of assessors and verification of assessor decisions. Centre quality assurance and assessment is monitored and guaranteed by Pearson.

## **The Pearson quality assurance processes will involve:**

- centre approval for those centres not already recognised as a centre for BTEC qualifications
- approval for the Pearson BTEC Level 4-7 qualifications and units.

For all centres delivering BTEC qualifications at Level 4-7, Pearson allocates a Standards Verifier (SV) for each sector offered, who will conduct an annual visit to quality assure the programmes.

## **Approval**

Centres are required to declare their commitment to ensuring the quality of the programme of learning and providing appropriate assessment opportunities for learners that lead to valid and accurate assessment outcomes. In addition, centres will commit to undertaking defined training and online standardisation activities.

Centres already holding BTEC approval are able to gain qualification approval online. New centres must complete a centre approval application.

## **Quality Assurance Guidance**

Details of quality assurance for the Pearson BTEC Level 4-7 qualifications are available on our website ([www.Pearson.com](http://www.Pearson.com)) under Signposts to Quality ([www.Pearson.com/quals/BTEC/quality/Pages/default.aspx](http://www.Pearson.com/quals/BTEC/quality/Pages/default.aspx)).

# Programme design and delivery

## Mode of delivery

Pearson does not normally define the mode of delivery for Pearson BTEC Level 4 to Level 8 qualifications. Centres are free to offer the qualifications using any mode of delivery (for example full-time, part-time, evening only, distance learning,) that meets learners' needs. However, centres must make sure that learners have access to the resources identified in the specification and to the sector specialists delivering and assessing the units. Centres must have due regard to Pearson's policies that may apply to different modes of delivery.

Those planning the programme should aim to address the occupational nature of the qualification by:

- engaging with learners, initially, through planned induction, and subsequently through the involvement of learners in planning for assessment opportunities
- using naturally occurring workplace activities and products to present evidence for assessment against the requirements of the qualification
- developing a holistic approach to assessment by matching evidence to different assessment criteria, learning outcomes and units, as appropriate, thereby reducing the assessment burden on learners and assessors
- taking advantage of suitable digital methods to capture evidence

## Resources

Pearson BTEC Level 5 qualifications are designed to give learners an understanding of the skills needed for specific vocational sectors. Physical resources need to support the delivery of the programme and the assessment of the learning outcomes, and should therefore normally be of industry standard. Staff delivering programmes and conducting the assessments should be familiar with current practice and standards in the sector concerned. Centres will need to meet any specific resource requirements to gain approval from Pearson.

Where specific resources are required these have been indicated in individual units in the *Essential resources* sections.

## Delivery approach

It is important that centres develop an approach to teaching and learning that supports the occupational nature of Pearson BTEC Level 5 qualifications and the mode of delivery. Specifications give a balance of practical skill development and knowledge requirements, some of which can be theoretical in nature. Tutors and assessors need to ensure that appropriate links are made between theory and practical application and that the knowledge base is applied to the sector. This requires the development of relevant and up-to-date teaching materials that allow learners to apply their learning to actual events and activity within the sector. Maximum use should be made of learners' experience.

# Access and recruitment

Pearson's policy regarding access to its qualifications is that:

- they should be available to everyone who is capable of reaching the required standards
- they should be free from any barriers that restrict access and progression
- there should be equal opportunities for all wishing to access the qualifications.

Centres are required to recruit learners to BTEC qualifications with integrity. This will include ensuring that applicants have appropriate information and advice about the qualifications and that the qualification will meet their needs. Centres should take appropriate steps to assess each applicant's potential and make a professional judgement about their ability to successfully complete the programme of study and achieve the qualification. This assessment will need to take account of the support available to the learner within the centre during their programme of study and any specific support that might be necessary to allow the learner to access the assessment for the qualification. Centres should consult Pearson's policy on learners with particular requirements.

Centres will need to review the entry profile of qualifications and/or experience held by applicants, considering whether this profile shows an ability to progress to a higher level qualification.

## Restrictions on learner entry

The Pearson BTEC Level 5 in Principles of Managing the Learning and Development Function accredited on the QCF for learners aged 19 years and above.

## Access arrangements and special considerations

Pearson's policy on access arrangements and special considerations for BTEC and Pearson NVQ qualifications aims to enhance access to the qualifications for learners with disabilities and other difficulties (as defined by the 1995 Disability Discrimination Act and the amendments to the Act) without compromising the assessment of skills, knowledge, understanding or competence.

Further information regarding Access Arrangements can be found in the Joint Council for Qualifications (JCQ) document *Access Arrangements, Reasonable Adjustments and Special Consideration for General and Vocational qualifications*. Further details on how to make adjustments for learners with protected characteristics are given in *the Supplementary Guidance for Reasonable Adjustment and Special Consideration in Vocational Internally Assessed Units*.

These documents are available on our website, at [www.edexcel.com/Policies](http://www.edexcel.com/Policies)

## **Recognition of Prior Learning**

Recognition of Prior Learning (RPL) is a method of assessment (leading to the award of credit) that considers whether a learner 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.

Pearson encourages centres to recognise learners' previous achievements and experiences whether at work, home and at leisure, 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. Provided that 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 sufficient, reliable and valid.

# Unit format

All units in the Pearson BTEC Level 5 Professional qualifications have a standard format. The unit format is designed to give guidance on the requirements of the qualification for learners, tutors, assessors and those responsible for monitoring national standards.

Each unit has the following sections.

## Unit title

The unit title is accredited on the QCF and this form of words will appear on the learner's Notification of Performance (NOP).

## Unit code

Each unit is assigned a QCF unit code that appears with the unit title on the National Database of Accredited Qualifications.

## QCF level

All units and qualifications within the QCF will have a level assigned to them, which represents the level of achievement. There are nine levels of achievement, from Entry Level to Level 8. The level of the unit has been informed by the QCF level descriptors and, where appropriate, the NOS and/or other sector/professional benchmarks.

## Credit value

All units have a credit value. The minimum credit value that may be determined for a unit is one, and credits can only be awarded in whole numbers. Learners will be awarded credits for the successful completion of whole units.

## Guided learning hours

Guided learning hours are defined as all the times when a tutor, trainer or facilitator is present to give specific guidance towards the learning aim being studied on a programme. This definition includes lectures, tutorials and supervised study in, for example, open learning centres and learning workshops. It also includes time spent by staff assessing learners' achievements. It does not include time spent by staff in day-to-day marking of assignments or homework where the learner is not present.

## Unit aim and purpose

The aim provides a clear summary of the purpose of the unit and is a succinct statement that summarises the learning outcomes of the unit.

## Unit introduction

The unit introduction gives the reader an appreciation of the unit in the vocational setting of the qualification, as well as highlighting the focus of the unit. It gives the reader a snapshot of the unit and the key knowledge, skills and understanding gained while studying the unit. The unit introduction also highlights any links to the appropriate vocational sector by describing how the unit relates to that sector.

## Learning outcomes

The learning outcomes of a unit set out what a learner is expected to know, understand or be able to do as the result of a process of learning.

## Assessment criteria

The assessment criteria of a unit specify the standard a learner is expected to meet to demonstrate that a learning outcome, or set of learning outcomes, has been achieved. The learning outcomes and assessment criteria clearly articulate the learning achievement for which the credit will be awarded at the level assigned to the unit.

## Unit content

The unit content identifies the breadth of knowledge, skills and understanding needed to design and deliver a programme of learning to achieve each of the learning outcomes. This is informed by the underpinning knowledge and understanding requirements of the related National Occupational Standards (NOS), where relevant. The content provides the range of subject material for the programme of learning and specifies the skills, knowledge and understanding required for achievement of the unit.

Each learning outcome is stated in full and then the key phrases or concepts related to that learning outcome are listed in italics followed by the subsequent range of related topics.

### Relationship between content and assessment criteria

The learner should have the opportunity to cover all of the unit content.

It is not a requirement of the unit specification that all of the content is assessed. However, the indicative content will need to be covered in a programme of learning in order for learners to be able to meet the standard determined in the assessment criteria.

### Content structure and terminology

The information below shows the unit content is structured and gives the terminology used to explain the different components within the content.

- Learning outcome: this is shown in bold at the beginning of each section of content.
- Italicised sub-heading: it contains a key phrase or concept. This is content which must be covered in the delivery of the unit. Colons mark the end of an italicised sub-heading.

- Elements of content: the elements are in plain text and amplify the sub-heading. The elements must be covered in the delivery of the unit. Semi-colons mark the end of an element.
- Brackets contain amplification of content which must be covered in the delivery of the unit.
- 'e.g.' is a list of examples, used for indicative amplification of an element (that is, the content specified in this amplification could be covered or could be replaced by other, similar material).

## **Essential guidance for tutors**

This section gives tutors additional guidance and amplification to aid understanding and a consistent level of delivery and assessment. It is divided into the following sections.

- *Delivery* – explains the content's relationship to the learning outcomes and offers guidance about possible approaches to delivery. This section is based on the more usual delivery modes but is not intended to rule out alternative approaches.
- *Assessment* – gives amplification about the nature and type of evidence that learners need to produce in order to achieve the unit. This section should be read in conjunction with the assessment criteria.
- *Essential resources* – identifies any specialist resources needed to allow learners to generate the evidence required for each unit. The centre will be asked to ensure that any requirements are in place when it seeks approval from Pearson to offer the qualification.
- *Indicative resource materials* – gives a list of learner resource material that benchmarks the level of study.



# Units



# Units

Unit 1:	Principles of Managing the Learning and Development Function	19
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# **Unit 1: Principles of Managing the Learning and Development Function**

Unit code: R/503/7038

QCF Level: 5

Credit value: 12

Guided learning hours: 50

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## **Unit aim**

This unit enables the learner to gain an in-depth understanding of best practice approaches to learning within organisations. It explores the challenges faced in managing learning solutions and aligning them to organisational goals.

## **Unit introduction**

This unit is aimed at those who wish to know about managing the learning and development function of an organisation. The learner will have the opportunity to create a learning business plan to support managing learning solutions within an organisation and to align it to the organisational goals, objectives and strategies.

It will enable learners to develop their management skills within the learning and development function of an organisation by developing their understanding of business models for the learning function, the relationship between the learning and development function and whole organisational needs, and how this develops into the learning project life cycle.

Learners will also explore funding opportunities, identifying appropriate models to support the learning business plan of an organisation.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

**On completion of this unit a learner should:**

Learning outcomes	Assessment criteria
1 Understand how to select business models within the learning function of an organisation.	1.1 Analyse business models for the learning function.
	1.2 Identify the most appropriate model the organisation could use.
	1.3 Justify the reasoning for using a selected business model.
2 Understand the application of financial funding models to own organisation.	2.1 Analyse the funding models.
	2.2 Identify the most appropriate model the organisation could use.
	2.3 Justify the choice of a selected funding model.
3 Understand the roles and responsibilities of the learning manager involved in the learning project life cycle.	3.1 Describe the learning project life cycle.
	3.2 Analyse the learning manager's roles and responsibilities in each phase of the learning cycle.
	3.3 Identify the key stakeholders and resources required to complete a learning project.
	3.4 Analyse how the learning manager can gain the commitment and contribution of the key stakeholders and secure resources at each phase of a learning project.
	3.5 Explain how the learning manager can implement the learning project life cycle.
	3.6 Explain the strategic methods to review the learning project life cycle within own organisation.

Learning outcomes	Assessment criteria
<p>4 Understand the relationship between the learning and development function and the organisation as a whole.</p>	4.1 Identify the current goals, vision and strategy of the organisation.
	4.2 Analyse the goals, vision and strategy of the learning and development function in relation to those of the organisation.
	4.3 Evaluate how the activities of the learning and development function assist the organisation in achieving its goals, vision and strategy.
	4.4 Justify how managing the learning and development function assists the organisation in achieving its goals, vision and strategy.
<p>5 Understand how to create a learning business plan that is linked to organisational goals and objectives.</p>	5.1 Identify the key components of the learning business plan.
	5.2 Evaluate the key components of the learning business plan in line with the goals and objectives of the organisation.
<p>6 Be able to create a learning business plan.</p>	6.1 Produce a business plan for the learning & development function in line with the goals and objectives of the organisation.

## Unit content

### 1 Understand how to select business models within the learning function of an organisation

#### 1.1 Analyse business models for the learning function

Business models for the learning function:

- MOST analysis (Mission, Objectives, Strategy, Tactics), a framework tool for analysing an organisation function
- Four box model (customer value proposition, profit formula, key resources, key processes)
- Business model wheel created by BMI (Business Model Institute)

#### 1.2 Identify the most appropriate model the organisation could use

The most appropriate model for an organisation would depend upon their:

- mission statement, objectives
- strategy
- management expectation
- departmental managers' requirements
- size of workforce
- geographical spread of the business and workforce

#### 1.3 Justify the reasoning for using a selected business model

Justify the reasoning against:

- How it will meet the organisational mission statement, objectives, strategy, management expectation, departmental managers' requirements, needs of the business
- Against the existing learning function
- Against past learning and development programmes

### 2 Understand the application of financial funding models to own organisation

#### 2.1 Analyse the funding models

Types of funding models:

- Government funding initiatives e.g. Apprenticeships, traineeships, employer led models, lifelong loans, lifelong learning accounts
- Local funding initiatives
- Workforce development budget/models
- Sponsorship

2.2 *Identify the most appropriate model the organisation could use*

The most appropriate model considering: available budget, return on investment, needs of the business and existing workforce, roll out of new business initiatives, innovations, core values

2.3 *Justify the choice of a selected funding model*

Justify the choice by considering: sustainability, value to the organisation, return on investment, meeting the organisation's budget

### 3 **Understand the roles and responsibilities of the learning manager involved in the learning project life cycle**

3.1 *Describe the learning project lifecycle*

Learning project lifecycle: identifying learning needs, design, development and testing, implementation, evaluation and improvement

3.2 *Analyse the learning manager's roles and responsibilities in each phase of the learning cycle*

- Leading the learning function, converting strategies into action plans
- Developing and monitoring budgets
- Ensuring learning activity is aligned, managed, efficient, effective
- Ensuring quality throughout the course development process
- Applying key components of the learning business plan, linking this to the organisation's strategic plan
- Understanding what drives business and how the learning function can best add value
- Building effective relationships with internal and external clients

3.3 *Identify the key stakeholders and resources required to complete a learning project*

- Key stake holders and resources, internal: senior managers, regional managers, department heads, workforce, colleagues, procurement, personnel department
- Key stake holders and resources, external: funding agencies, training providers, expert consultants, customers, other businesses, community organisations

3.4 *Analyse how the learning manager can gain the commitment and contribution of the key stakeholders and secure resources at each phase of a learning project*

Gain commitment and contributions of the key stakeholders, and securing resources by:

- Service Level Agreement (SLA), operational agreements, contractual arrangements, action planning, meetings, focus groups
- Secure agreed budget, identify suitable working groups, create and manage the organisation's learning business plan, set mile-stone achievements against the learning business plan

3.5 *Explain how the learning manager can implement the learning project life cycle*

Adhering to agreed budget, creating working groups, implementing the organisation's learning business plan, measuring mile-stone achievements against the learning business plan, identifying what process and functions to outsource

3.6 *Explain the strategic methods to review the learning project life cycle within own organisation*

- Strategic methods to review the learning project life cycle through: evaluation of resource, finance, quality, risk and acceptance plans

#### 4 **Understand the relationship between the learning and development function and the organisation as a whole**

4.1 *Identify the current goals, vision and strategy of the organisation*

- Current goals, visions and strategy of the organisation through research
- Goals: meeting the business needs, meeting individual needs, meeting the business strategic plan, identified return on investment
- Vision: vision or mission statement, ways of working, 3 to 10 year plans, guiding principles
- Strategy: business model, business strategic plan, sustainability

4.2 *Analyse the goals, vision and strategy of the learning and development function in relation to those of the organisation*

- Goals, vision and strategy of the learning and development function in relation to those of the organisation looking at goals, vision and strategy for :
- Suitability of the learning and development function plan against the business strategic plan
- Opportunities in place for the business and individual needs to be met
- Probability of 3 – 10 year plans being met

4.3 *Evaluate how the activities of the learning and development function assist the organisation in achieving its goals, vision and strategy*

- Through evaluation of the learning and development function against identified actual results and behaviours
- 'Actual' against 'planned' for return on investment
- Feedback from others, e.g. the workforce through engagement surveys, those involved in the delivery of the programmes of learning, line managers of those who have attended the programmes of learning
- Effectiveness of the learning and development function in meeting the business needs

4.4 *Justify how managing the learning and development function assists the organisation in achieving its goals, vision and strategy*

- Justify through
- Using evidence from the evaluation i.e. of return on investment, feedback from others such as the workforce, those involved in the delivery of the programmes and line managers
- Identifying what has been effective within the learning and development plan against the performance of the business

## 5 **Understand how to create a learning business plan that is linked to organisational goals and objectives**

5.1 *Identify the key components of the learning business plan*

- Key components of the business learning plan, such as background, operational overview, financial analysis, risk analysis
- Outlining results of a learning needs analysis, such as legislation, organisational, job or function, team or individual needs
- Recognising learning need activities required outside of training courses
- Recommendations for business improvements

5.2 *Evaluate the key components of the learning business plan in line with the goals and objectives of the organisation*

- Using the identified components of the learning business plan from 5.1 to evaluate
- The key drivers that will ensure the delivery of the learning business plan
- They key business goals and objectives and what learning and development functions will support their delivery

**Be able to create a learning business plan**

6.1 *Produce a business plan for the learning & development function in line with goals and objectives of the organisation*

- Outline of the key components based on the goals and objectives of the organisation, identifying any specifics around items such as financial implications and resources
- Link to the learning needs analysis of the organisation, identifying any job or function, team or individual needs, legislation and H&S needs

## **Essential guidance for tutors**

### **Delivery**

At the beginning of this unit, time should be given to discuss the opportunities that will be available to learners in their research of real organisations. Ideally, the learner will be working in a learning and development context, or about to be, although this is not a requirement of the unit.

The knowledge content should be introduced and delivered in the class room, allowing learners to then research organisations to ensure realistic and authentic approaches to managing the learning and development function.

Whilst guidance has been given below for each learning outcome, where possible, the tutor should combine learning outcomes in the delivery where there are natural links.

#### **Learning outcome 1**

Tutor presentation explores content on business models within the learning function of an organisation, using learner experience where possible to encourage group discussion.

#### **Learning outcome 2**

Tutor presentation explores financial funding models, covering in detail to ensure learner understanding and using examples from different contexts to enable learners to make informed decisions on the most appropriate funding model. Individual or group learner presentations on funding opportunities to demonstrate and confirm learner knowledge.

#### **Learning outcome 3**

Following tutor presentation, learners undertake independent research and undertake presentation to whole of group. Follow up with a sharing of ideas through group discussion.

#### **Learning outcome 4**

Following tutor introduction to the relationship between the learning and development function and the organisation as a whole, learners to undertake independent research bringing their findings back to the classroom for discussion.

#### **Learning outcome 5 & 6**

These two learning outcomes bring together the learning that has taken place in learning outcomes 1-4 through the learners being able to understand how to create a learning business plan and then creating one.

Following tutor introduction, learners learn through independent research and the practical application of putting together their own learning business plan.

## **Assessment**

Assessment for this qualification takes the form of ongoing review of learner performance by the Assessor and Internal Quality Assurer. Learners must meet all assessment criteria to pass the unit.

It is recommended that assignments are research based, having a strong element of writing or recorded discussion to enable the learner to demonstrate their understanding of the subject and to meet the assessment criteria. The assignment must also give the learner the opportunity to study the subject at level 5.

Learning outcome 6 is competence based and the learner should be assessed through a practical task of creating a business plan.

The assessment requirements for Level 5 Certificate in Principles of Managing the Learning and Development Function must be followed; please see Annex A

## **Indicative resource materials**

### **Textbooks**

Roland and Frances Bee – *Learning Needs Analysis and Evaluation* 2<sup>nd</sup> Edition (Chartered Institute of Personnel and Development) ISBN 0852929676 9780852929674

Andrew Mayo – *Creating a Learning and Development Strategy* (Chartered Institute of Personnel and Development) ISBN 1843980568 9781843980568

Jim Muehlhausen – *Business Models for Dummies* (John Wiley & Sons, Inc. 2013) ISBN 978-1-118-54761-8

### **Journals**

Training Journal

### **Websites**

[www.apprenticeships.org.uk](http://www.apprenticeships.org.uk)

[www.niace.org.uk](http://www.niace.org.uk)

[www.trainingjournal.com](http://www.trainingjournal.com)

## Further information

For further information please call Customer Services on 0844 576 0026 (calls may be recorded for training purposes) or visit our website ([www.Pearson.com](http://www.Pearson.com)).

## Useful publications

Related information and publications include:

- Guidance for Centres Offering Pearson/BTEC QCF Accredited Programmes (Pearson, distributed to centres annually)
- Functional skills publications – specifications, tutor support materials and question papers
- Regulatory arrangements for the Qualification and Credit Framework (published by Ofqual) August 2008
- the current Pearson publications catalogue and update catalogue.

Pearson publications concerning the Quality Assurance System and the internal and external verification of vocationally related programmes can be found on the Pearson website and in the Pearson publications catalogue.

NB: Some of our publications are priced. There is also a charge for postage and packing. Please check the cost when you order.

# Professional development and training

Pearson supports UK and international customers with training related to BTEC qualifications. This support is available through a choice of training options offered in our published training directory or through customised training at your centre.

The support we offer focuses on a range of issues including:

- planning for the delivery of a new programme
- planning for assessment and grading
- developing effective assignments
- building your team and teamwork skills
- developing student-centred learning and teaching approaches
- building functional skills into your programme
- building in effective and efficient quality assurance systems.

The national programme of training we offer can be viewed on our website ([www.Pearson.com/training](http://www.Pearson.com/training)). You can request customised training through the website or by contacting one of our advisers in the Training from Pearson team via Customer Services to discuss your training needs.

If you would like your Curriculum Development Manager to contact you, please get in touch with your regional office on: 0844 463 2535.

The training we provide:

- is active – ideas are developed and applied
- is designed to be supportive and thought provoking
- builds on best practice.

Our training is underpinned by the former LLUK standards for those preparing to teach and for those seeking evidence for their continuing professional development.

# Annexe A

## Assessment strategy

### 1 Assessment principles

The following principles apply to the assessment of the qualification:

- 1.1 The focus of assessment should be on naturally occurring evidence, with emphasis on tangible outcomes where these are available (such things as, the items that have been produced and any supporting drawings, designs or plans).
- 1.2 The use of work place assessment is the preferred method.
- 1.3 Simulations may be appropriate for some aspects of the standards (for example, in respect to health and safety for working at height and responding to a fall or emergency).
- 1.4 External Verification will focus on process, underpinning knowledge and understanding rather than a reinvestigation of individual learner evidence.
- 1.5 Where learners have particular needs (for example, physical disability or limitations due to circumstances such as being in an offending institution) the evidence requirements may be varied providing that any alternative evidence demonstrates appropriate standards of competence as identified in the unit or specific part of a unit.

### 2 External quality control

- 2.1 In relation to Enhanced External Verification:
  - Pearson will follow a sampling regime that is consistent with current good practice, as specified by the regulatory authorities, and will ensure that each centre receives a sufficient number of External Verification visits.
  - At these visits learner assessment evidence and internal verification practice will be reviewed in respect of specific units within each qualification.
  - Pearson will apply a risk rating system in line with Pearson's external verification policy to ensure that each centre's strengths and weaknesses can be identified and to ensure prompt and appropriate action is taken to address any weaknesses, which pose risk to the quality of the system.
- 2.2 In relation to inter-assessor and inter-centre consistency, Pearson will provide support to centres to ensure that assessors and internal verifiers carry out their responsibilities in a consistent and rigorous fashion. This is likely to involve some or all of the following:
  - opportunities for assessors and internal verifiers, both within and across centres to network, question professional practitioners and benchmark their practice in relation to the occupation(s) within which they practice.

- regular contact between Standards Verifiers and professional practitioners to enable them to maintain an accurate and current level of understanding of the standards and best practice in assessment.
- production of centrally devised recording and guidance materials which are accepted as clear, jargon-free and concise and which support the planning and conduct of assessments, the interpretation of evidence and the elicitation of learner knowledge and understanding to a comparable breadth and depth across centres and assessors.
- the production of evidence lists indicating the types of activities and outcomes in each occupational area which could be called upon to provide evidence for a given occupational qualification.

### **3 Workplace performance requirements and the use of simulation**

3.1 Workplace performance evidence should always form the greatest proportion of each learner's evidence, attesting to the fact that for an occupational qualification the learner has demonstrated competence across the full range of performance requirements and that they are able to apply relevant knowledge and skills. Unless otherwise indicated, it is a general principle that evidence from simulations should only be employed under the following circumstances:

- where for the learner to be assessed performing this task in a real working environment could be deemed to pose risks to the learner or others (*for example, what to do in the event of a fall when working at height*);

*or*

- where the situation or task to be assessed arises so infrequently that it would be impractical to wait for an opportunity to assess it solely when it occurred for real (*for example, flying performers live*)

*or*

- where the equipment or other resources needed are not available in the learner's normal workplace.

3.2 Simulations should always be very carefully designed. The aim of simulation is to:

*'provide an environment which replicates the key characteristics of the workplace in which the skill to be assessed is normally employed'.*

A realistic working environment (for the purpose of simulated work activities) is regarded as one that replicates a real working environment. For example, a college production that operates on a commercial basis (i.e. it has a profit and loss account) is acceptable for technical and production roles, but a college production, which is only performed for the benefit of other students, is not. However, simulated activity may be used within a production setting, for assessment purposes in order to prevent any barriers to achievement.

Where simulation is indicated, it is recommended that it be designed to address the following characteristics:

- the learner is required to use materials, tools and equipment found and used within current workplace environments to carry out the actions being assessed;
- the learner is provided with information, advice and guidance as to the outcomes to be achieved, at a level of detail that would be typical of current workplace contexts;
- the learner is required to carry out actions and responsibilities which would be naturally delegated to someone competent in the occupational area, within current workplace contexts;
- if it would affect the learner's actions and decision-making (*for example, in rigging, lighting or sound roles*), the physical environment in which the simulation occurs should replicate that in which the required action/outcome would occur within a current workplace context; and
- if it would affect the learner's actions and decision-making (*for example, stage management, dressing or hair and makeup roles*), the other people with which the learner is required to interact should behave 'in character' for the role they are playing within the simulation.

Centres are required to advise the Standards Verifier (SV) in advance of their intention to use simulations and the design of the simulation should be approved by the SV prior to use.

### **3 Occupational competence of line managers, assessors, verifiers and expert witnesses**

4.1 Those acting as assessors, internal verifiers and external verifiers will require strong interpersonal and communication skills in addition to their assessment and technical expertise, and will require to undertake appropriate continuing professional development in order to maintain their occupational competence. Assessors, internal and Standards Verifier's experience and competence is likely to be evidenced by:

- possession of appropriate qualifications
- possession of a relevant professional or occupational qualification
- membership of a relevant professional body
- continuing professional development.

**Assessors** must:

- hold or be working towards an appropriate assessment qualification
- have relevant current or recent past industry experience and competence of the occupational working area at or above the level being assessed. The quality of occupational experience must be sufficient to ensure the credibility of assessment judgements.

**Internal Verifiers** must:

- hold or be working towards an appropriate verifier qualification
- have relevant current or recent past industry experience and competence in an area related to the occupational working area at or above the level which they are verifying. The quality of occupational experience must be sufficient to ensure the credibility of assessment judgements.

**Standards Verifiers** must:

- hold an appropriate qualification in verification
- have substantial relevant current or recent past industry experience within the creative and cultural industry. The quality of occupational experience must be sufficient to ensure the credibility of assessment judgements.

**Expert witnesses or work based recorders** must:

- be independent of the outcome of the assessment
- have a working knowledge of the units on which their testimony is based
- have enough experience and occupational competence to make a valid judgement about competence in the area they will be attesting to.

The role of an expert witness or work-based recorder is to attest to evidence of learners' knowledge, understanding, skills and performance by, for example providing:

- a statement describing how the learner performed; or
- a record of discussions with the learner about their knowledge and understanding

# Annexe B

## **Wider curriculum mapping**

Pearson BTEC Level 5 qualifications give learners opportunities to develop an understanding of spiritual, moral, ethical, social and cultural issues as well as an awareness of citizenship, environmental issues, European developments, health and safety considerations and equal opportunities issues.

### **Spiritual, moral, ethical, social and cultural issues**

Throughout the delivery of these qualifications learners will have the opportunity to actively participate in different kinds of decision making. They will have to consider fair and unfair situations and explore how to resolve conflict. Working in small groups they will learn how to respect and value others' beliefs, backgrounds and traditions.

### **Citizenship**

Learners undertaking these qualifications will have the opportunity to develop their understanding of citizenship issues.

### **Environmental issues**

Developing a responsible attitude towards the care of the environment is an integral part of this qualification. Learners are encouraged to minimise waste and discuss controversial issues.

### **European developments**

Much of the content of the qualification applies throughout Europe, even though the delivery is in a UK context.

### **Health and safety considerations**

Health and safety is embedded within many of the units in this qualification. Learners will consider their own health and safety at work, how to identify risks and hazards and how to minimise those risks.

### **Equal opportunities issues**

There will be opportunities throughout this qualification to explore different kinds of rights and how these affect both individuals and communities, for example learners will consider their rights at work and the rights of employers and how these rights affect the work community.



# Annexe C

## National Occupational Standards

The grid below maps the knowledge covered in the Pearson BTEC Level 5 Award In Principles of Managing the Learning and Development Function (QCF) against the underpinning knowledge of the National Occupational Standards,

### KEY

# indicates partial coverage of the NVQ unit

a blank space indicates no coverage of the underpinning knowledge

NOS	Unit 1
SCDLSS323 Create a climate that promotes learning	#
LSILADD04 Plan and prepare specific learning and development opportunities	#
SFT F18 Develop and implement an overall fundraising Strategy	#
LSIILARG1v2 Develop and implement your organisation's strategy for facilitating lifelong learning	#
FINTCS14 Understand the business strategy and commercial objectives of the organisation as they relate to the Training and Competence Scheme	#
SFJPSG2.3.1 Develop a strategic business plan for your organisation	#
SFJCPS9.1 Manage a project	#



# Annexe D

## Glossary of accreditation terminology

The following information about this qualification can also be found on the Pearson website.

<b>Accreditation start/end date</b>	The first/last dates that Pearson can register learners for a qualification.
<b>Certification end date</b>	The last date on which a certificate may be issued by Pearson.
<b>Credit value</b>	All units have a credit value. The minimum credit value that may be determined for a unit is one, and credits can only be awarded in whole numbers. Learners will be awarded credits for the successful completion of whole units.
<b>Guided Learning Hours (GLH)</b>	Guided learning hours are defined as all the times when a tutor, trainer or facilitator is present to give specific guidance towards the learning aim being studied on a programme. This definition includes lectures, tutorials and supervised study in, for example, open learning centres and learning workshops. It also includes time spent by staff assessing learners' achievements. It does not include time spent by staff in day-to-day marking of assignments or homework where the learner is not present.
<b>Learning Aims Database</b>	Link to the Learning Aims Database, which features detailed funding information by specific learning aim reference.
<b>Learning Aim Reference</b>	Unique reference number given to the qualification by the funding authorities on accreditation.
<b>Level</b>	The level at which the qualification is positioned in the Qualifications and Credit Framework (QCF).
<b>Performance tables</b>	This/these qualifications is/are listed on the Department for Education (DfE) website School and College Achievement and Attainment Tables (SCAAT) as performance indicators for schools and colleges.
<b>Qualifications Accreditation Number (QAN)</b>	Unique reference number given to the qualification by the regulatory authorities on accreditation.
<b>Register of Regulated Qualifications</b>	Link to the entry on the Register of Regulated Qualifications for a particular qualification. This database features detailed accreditation information for the particular qualification.
<b>Section 96</b>	Section 96 is a section of the Learning and Skills Act 2000. This shows for which age ranges the qualification is publicly funded for under-19 learners.

<b>Title</b>	The accredited title of the qualification.
<b>UCAS points</b>	This/these qualification(s) is/are listed on the Universities and Colleges Admissions Service (UCAS) tariff for those wishing to progress to higher education.

# Annexe F

## BTEC Specialist and Professional qualifications

BTEC qualifications on the NQF	Level	BTEC Specialist and Professional Qualifications on the QCF	BTEC qualification suites on the QCF
<b>BTEC Level 7 Advanced Professional Qualifications</b> BTEC Advanced Professional Award, Certificate and Diploma	<b>7</b>	<b>BTEC Level 7 Professional Qualifications</b> BTEC Level 7 Award, Certificate, Extended Certificate and Diploma	
<b>BTEC Level 6 Professional Qualifications</b> BTEC Professional Award, Certificate and Diploma	<b>6</b>	<b>BTEC Level 6 Professional Qualifications</b> BTEC Level 6 Award, Certificate, Extended Certificate and Diploma	
<b>BTEC Level 5 Professional Qualifications</b> BTEC Professional Award, Certificate and Diploma	<b>5</b>	<b>BTEC Level 5 Professional Qualifications</b> <b>Pearson BTEC Level 5 Award in Principles of Managing the Learning and Development Function</b> BTEC Level 5 Award, Certificate, Extended Certificate and Diploma	<b>BTEC Level 5 Higher Nationals</b> BTEC Level 5 HND Diploma
<b>BTEC Level 4 Professional Qualifications</b> BTEC Professional Award, Certificate and Diploma	<b>4</b>	<b>BTEC Level 4 Professional Qualifications</b> BTEC Level 4 Award, Certificate, Extended Certificate and Diploma	<b>BTEC Level 4 Higher Nationals</b> BTEC Level 4 HNC Diploma
<b>BTEC Level 3 Qualifications</b> BTEC Award, Certificate, Extended Certificate and Diploma	<b>3</b>	<b>BTEC Level 3 Specialist Qualifications</b> BTEC Level 3 Award, Certificate, Extended Certificate and Diploma	<b>BTEC Level 3 Nationals</b> BTEC Level 3 Certificate, Subsidiary Diploma, Diploma and Extended Diploma

<b>BTEC qualifications on the NQF</b>	<b>Level</b>	<b>BTEC Specialist and Professional Qualifications on the QCF</b>	<b>BTEC qualification suites on the QCF</b>
<b>BTEC Level 2 Qualifications</b> BTEC Award, Certificate, Extended Certificate and Diploma	<b>2</b>	<b>BTEC Level 2 Specialist Qualifications</b> BTEC Level 2 Award, Certificate, Extended Certificate and Diploma	<b>BTEC Level 2 Firsts</b> BTEC Level 2 Certificate, Extended Certificate and Diploma
<b>BTEC Level 1 Qualifications</b> BTEC Award, Certificate, Extended Certificate and Diploma	<b>1</b>	<b>BTEC Level 1 Specialist Qualifications</b> BTEC Level 1 Award, Certificate, Extended Certificate and Diploma	<b>BTEC Level 1 Qualifications</b> BTEC Level 1 Award, Certificate and Diploma (vocational component of Foundation Learning)
	<b>E</b>	<b>BTEC Entry Level Specialist Qualifications</b> BTEC Entry Level Award, Certificate, Extended Certificate and Diploma	<b>BTEC Entry Level Qualifications (E3)</b> BTEC Entry Level 3 Award, Certificate and Diploma (vocational component of Foundation Learning)

**NQF** = National Qualifications Framework

**QCF** = Qualifications and Credit Framework

For most qualifications on the **NQF**, the accreditation end date is normally 31 August 2010 or 31 December 2010.

For qualifications on the **QCF**, the accreditation start date is usually 1 September 2010 or 1 January 2011.

<b>QCF qualification sizes</b>	
<b>Award</b>	1-12 credits
<b>Certificate</b>	13-36 credits
<b>Diploma</b>	37+ credits



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For more information on Edexcel and BTEC qualifications please visit our website: [www.edexcel.com](http://www.edexcel.com) and [www.btec.co.uk](http://www.btec.co.uk)

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