

Specification

BTEC Specialist qualifications

Edexcel BTEC Level 3 Award and Certificate in WorkSkills
(QCF)

For first teaching September 2011

Edexcel, a Pearson company, is the UK's largest awarding body, offering academic and vocational qualifications and testing to more than 25,000 schools, colleges, employers and other places of learning in the UK and in over 100 countries worldwide. Qualifications include GCSE, AS and A Level, NVQ and our BTEC suite of vocational qualifications from entry level to BTEC Higher National Diplomas, recognised by employers and higher education institutions worldwide.

We deliver 9.4 million exam scripts each year, with more than 90% of exam papers marked onscreen annually. As part of Pearson, Edexcel continues to invest in cutting-edge technology that has revolutionised the examinations and assessment system. This includes the ability to provide detailed performance data to teachers and students which helps to raise attainment.

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Edexcel BTEC Specialist qualification titles covered by this specification

Edexcel BTEC Level 3 Award in WorkSkills (QCF)

Edexcel BTEC Level 3 Certificate in WorkSkills (QCF)

These qualifications have been accredited to the Qualifications and Credit Framework (QCF) and are eligible for public funding as determined by the Department for Education (DfE) under Section 96 of the Learning and Skills Act 2000.

The qualification titles listed above feature in the funding lists published annually by the DfE and the regularly updated website www.education.gov.uk/. The QCF Qualifications Number (QN) 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 Numbers for the qualifications in this publication are:

Edexcel BTEC Level 3 Award in WorkSkills (QCF)	600/2291/7
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Edexcel BTEC Level 3 Certificate in WorkSkills (QCF)	600/2381/8
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These qualification titles will appear on learners' certificates. Learners need to be made aware of this when they are recruited by the centre and registered with Edexcel.

These qualifications are accredited by Ofqual as being Stand Alone.

Welcome to the Edexcel BTEC Level 3 Award and Certificate in WorkSkills (QCF)

We are delighted to introduce our new qualifications, which will be available for teaching from September 2011. These qualifications have been revised and conform with the requirements of the new QCF (Qualifications and Credit Framework).

Focusing on the BTEC Level 3 Award and Certificate in WorkSkills (QCF)

The Edexcel Level 3 Award and Certificate in WorkSkills (QCF) have been designed to offer learners a flexible, relevant course to improve their understanding and application of work-based skills.

These qualifications ensure that the knowledge, skills and understanding provided by these qualifications are relevant, current and useful for both learners and potential employers. These qualifications have been designed to support employability.

Learners have the opportunity to follow a flexible course and centres can ensure learning takes place in a realistic employment or simulated employment environment.

Straightforward to implement, teach and assess

Implementing BTECs couldn't be easier. They are designed to fit easily 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.

All you need to get started

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

- a framework of equivalencies, so you can see how these qualifications compare with other Edexcel vocational qualifications
- information on rules of combination, structures and quality assurance, so you can deliver the qualifications 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 3 Specialist qualifications?

BTEC Specialist qualifications are qualifications at Entry Level to Level 3 in the Qualifications and Credit Framework (QCF) and are designed to provide specialist 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 Specialist qualifications provide much of the underpinning knowledge and understanding for the National Occupational Standards for the sector, where these are appropriate. A number of BTEC Specialist qualifications are recognised as the knowledge components of Apprenticeships Frameworks.

On successful completion of a BTEC Specialist 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.

Edexcel BTEC Level 3 Award

The Edexcel BTEC Level 3 Award provides an introduction to the skills, qualities and knowledge that may be required for employment in a particular vocational sector.

Edexcel BTEC Level 3 Certificate

The Edexcel BTEC Level 3 Certificate extends the work-related focus of the Edexcel BTEC Level 3 Award and covers the additional knowledge and practical skills required for employment in a particular vocational sector.

Key features of the Edexcel BTEC Level 3 Award and Certificate in WorkSkills (QCF)

The Edexcel BTEC Level 3 Award and Certificate in WorkSkills (QCF) have been 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, personal skills and attributes essential for successful performance in working life
- achieve a nationally recognised Level 3 vocationally-related qualification
- progress to employment in a particular vocational sector
- progress to related general and/or vocational qualifications.

National Occupational Standards

Where relevant, Edexcel BTEC Level 3 Specialist qualifications are designed to provide some of the underpinning knowledge and understanding for the National Occupational Standards (NOS), as well as developing practical skills in preparation for work and possible achievement of NVQs in due course. NOS form the basis of National Vocational Qualifications (NVQs). Edexcel BTEC Level 3 qualifications do not purport to deliver occupational competence in the sector, which should be demonstrated in a work context.

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 Edexcel BTEC Level 3 qualifications

When combining units for an Edexcel BTEC Level 3 Award or Certificate in WorkSkills (QCF), it is the centre's responsibility to ensure that the following rules of combination are adhered to.

Edexcel BTEC Level 3 Award in WorkSkills (QCF)

The Edexcel BTEC Level 3 Award in WorkSkills is a 6-credit and 45-60- guided learning hour (GLH) qualification.

It consists of optional units that provide for a combined total of 6 credits.

At least 4 credits must be at Level 3 or above.

Optional units may be selected from Level 2 WorkSkills units (page 5).

Edexcel BTEC Level 3 Certificate in WorkSkills (QCF)

The Edexcel BTEC Level 3 Certificate in WorkSkills is an 18-credit and 145-180 guided learning hour (GLH) qualification.

It consists of optional units that provide for a combined total of 18 credits.

At least 10 credits must be at Level 3 or above.

Optional units may be selected from Level 2 WorkSkills units (*see page 5*).

Level 3 units

Edexcel BTEC Level 3 Award and Certificate in WorkSkills (QCF)			
Unit		Credit	Level
1	Career Development	2	3
2	Maximising Potential when Applying for a Job	1	3
3	Strategies to Improve Job Interview Skills	2	3
4	Preparing for Work Placement	1	3
5	Reflecting on Work Placement	1	3
6	Developing Confidence for Work	1	3
7	Organising and Chairing Meetings	1	3
8	Personal Skills for Leadership	1	3
9	Presentations for Work	1	3
10	Planning for Professional Development	2	3
11	Reviewing Professional Development	1	3
12	Negotiation Skills and Persuasion in the Workplace	2	3
13	Giving and Receiving Feedback	2	3
14	Coaching Skills for the Workplace	2	3
15	Mentoring Skills for the Workplace	2	3
16	Recognition and Resolution of Bullying in the Workplace	1	3
17	Managing a Work-life Balance	1	3
18	Project Management Skills	1	3
19	Skills for a Portfolio Career	1	3
20	Skills for Starting a Business	1	3
21	Critical Thinking	2	3
22	Academic Research Skills	2	3
23	Planning for Further Learning Development	2	3
24	Manage Own Learning	1	3

Level 2 WorkSkills units available as optional units

Please see the specification for the Edexcel BTEC Level 2 Award, Certificate, Extended Certificate and Diploma in WorkSkills (available from the Edexcel website www.edexcel.com)

Edexcel BTEC Level 2 WorkSkills units	Credit value
Alternatives to Paid Work	1
Working as a Volunteer	2
Managing Your Own Money	2
Searching for a Job	1
Applying for a Job	1
Preparing for an Interview	1
Interview Skills	1
Self-management Skills	2
Self-assessment	2
Career Progression	2
Developing Personal Skills for Leadership	2
Practising Leadership Skills with Others	2
Learning with Colleagues and Other Learners	2
Communicating Solutions to Others	2
Effectiveness at Work	1
Working in a Team	3
Learning from More Experienced People	2
Building Working Relationships with Colleagues	2
Building Working Relationships with Customers	2
Investigating Rights and Responsibilities at Work	1
Managing Your Health at Work	1
Setting and Meeting Targets at Work	2
Solving Work-related Problems	2
Summarising Documents	1
Contributing to Meetings	1
Preparing for Work Placement	1
Learning from Work Placement	2
Planning an Enterprise Activity	1
Running an Enterprise Activity	1
Producing a Product	1
Understanding Employee Responsibilities and Rights	3

Assessment

All units within these qualifications are internally assessed. The qualifications are criterion referenced, based on the achievement of all the specified learning outcomes.

To achieve a 'pass' a learner must have successfully passed **all** the assessment criteria.

Guidance

The purpose of assessment is to ensure that effective learning has taken place to give learners the opportunity to:

- meet the standard determined by the assessment criteria and
- achieve the learning outcomes.

All the assignments created by centres should be reliable and fit for purpose, and should be built on the unit assessment criteria. Assessment tasks and activities should enable learners to produce valid, sufficient and reliable evidence that relates directly to the specified criteria. Centres should enable learners to produce evidence in a variety of different forms, including performance observation, presentations and posters, along with projects, or time-constrained assessments.

Centres are encouraged to emphasise the practical application of the assessment criteria, providing a realistic scenario for learners to adopt, and making maximum use of practical activities. The creation of assignments that are fit for purpose is vital to achievement and their importance cannot be over-emphasised.

The assessment criteria must be clearly indicated in the assignments briefs. This gives learners focus and helps with internal verification and standardisation processes. It will also help to ensure that learner feedback is specific to the assessment criteria.

When designing assignments briefs, centres are encouraged to identify common topics and themes. A central feature of vocational assessment is that it allows for assessment to be:

- current, ie to reflect the most recent developments and issues
- local, ie to reflect the employment context of the delivering centre
- flexible to reflect learner needs, ie at a time and in a way that matches the learner's requirements so that they can demonstrate achievement.

Qualification grade

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

In Edexcel BTEC Level 3 Specialist 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

The Edexcel quality assurance processes for BTEC Specialist qualifications involve:

- **Centre approval** for centres not currently approved to offer BTEC qualifications
- **Qualification approval.** For existing centres, this can normally be done online via Edexcel online
- **Quality Review and Development.** This checks centre processes and prescribes remedial action where necessary.

For qualifications that include internal assessment, Edexcel's quality assurance processes also include:

- **Accreditation of lead internal verifiers.** This involves online training and standardisation of Lead Internal Verifiers via our Online Training and Standardisation system. Please note that not all qualifications are available for online training and standardisation.
- **Standards verification.** This involves sampling of assessment evidence by Edexcel's standards verifiers to ensure quality and standards. This takes place where:
 - a centre's Lead Internal Verifier has not yet achieved accreditation
 - a qualification is being sampled to confirm that it meets national standards
 - a BTEC Specialist qualification is not covered by online training and standardisation
 - learners are registered for the qualification as part of an apprenticeship programme.

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 Edexcel BTEC Level 3 qualifications are set out in centre guidance which is published on our website (www.edexcel.com).

Programme design and delivery

Mode of delivery

Edexcel does not normally define the mode of delivery for Edexcel BTEC Entry to Level 3 qualifications. Centres are free to offer the qualifications using any mode of delivery (such as full-time, part-time, evening only, distance learning) that meets their learners' needs. Whichever mode of delivery is used, centres must ensure that learners have appropriate access to the resources identified in the specification and to the subject specialists delivering the units. This is particularly important for learners studying for the qualification through open or distance learning.

Learners studying for the qualification on a part-time basis bring with them a wealth of experience that should be utilised to maximum effect by tutors and assessors. The use of assessment evidence drawn from learners' work environments should be encouraged. Those planning the programme should aim to enhance the vocational nature of the qualification by:

- liaising with employers to ensure a course relevant to learners' specific needs
- accessing and using non-confidential data and documents from learners' workplaces
- including sponsoring employers in the delivery of the programme and, where appropriate, in the assessment
- linking with company-based/workplace training programmes
- making full use of the variety of experience of work and life that learners bring to the programme.

Resources

Edexcel BTEC Level 3 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 Edexcel.

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 vocational nature of Edexcel BTEC Level 3 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.

Additional and specialist learning

Additional and Specialist Learning (ASL) consists of accredited qualifications at the same level as, or one level above, a 14-19 Diploma course of study, which have been approved under Section 96 of the Learning and Skills Act 2000. The ASL may include BTEC qualifications which are also available to learners not following a 14-19 Diploma course of study.

ASL qualifications are listed on the 14-19 Diploma Catalogue which is available on the Register of Regulated Qualifications (www.ofqual.gov.uk). The catalogue will expand over time as more qualifications are accredited and approved.

Centres undertaking, or preparing to undertake, ASL should refer regularly to the Edexcel website for information regarding additions and the 14-19 Diploma Catalogue for the latest information.

Functional skills

Edexcel Level 3 BTEC Specialist qualifications give learners opportunities to develop and apply functional skills. Functional skills are, however, not required to be achieved as part of the BTEC Specialist qualification(s) rules of combination. Functional skills are offered as stand alone qualifications.

Access and recruitment

Edexcel'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 Edexcel'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 Edexcel BTEC Level 3 Award and Certificate in WorkSkills are accredited on the QCF for learners aged 14 and above.

Access to qualifications for learners with disabilities and other difficulties

Edexcel's policy is to promote access to its qualifications for learners with disabilities and other difficulties (as defined by the Equality Act 2010 and any subsequent amendments to the Act) without compromising the assessment of skills, knowledge, understanding or competence.

Further details are given in the policy document *Reasonable Adjustment and Special Considerations for BTEC and Edexcel NVQ Qualifications* which can be found on the Edexcel website.

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.

Edexcel 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 Edexcel BTEC Level 3 Specialist 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

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 how 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.
- 'eg' 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.
- *Links* – identifies other units in the WorkSkills suite which relate to the content of the unit
- *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 Edexcel to offer the qualification.
- *Indicative resource materials* – gives a list of learner resource material that benchmarks the level of study.

Units

Unit 1: Career Development	17
Unit 2: Maximising Potential When Applying for a Job	23
Unit 3: Strategies to Improve Job Interview Skills	29
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Unit 22: Academic Research Skills	145
Unit 23: Planning for Further Learning Development	151
Unit 24: Manage Own Learning	157

Unit 1: Career Development

Unit code:	R/503/2891
QCF Level 3:	BTEC Specialist
Credit value:	2
Guided learning hours:	15

Unit aim

The aim of this unit is to give learners the knowledge and understanding needed to make career decisions, together with the skills to plan a career pathway.

Unit introduction

Making career decisions involves sourcing up-to-date information to identify work and career opportunities. This unit provides learners with a practical pathway through the process of making career decisions. Learners are expected to source up-to-date information which they can use to identify work and career opportunities.

The first learning outcome gives learners the opportunity to research career choices and investigate the wider, short- and long- term, national and international issues affecting job markets.

The second learning outcome concentrates on self- awareness and the learner's key career attributes. Learners will have the opportunity to undergo diagnostic tests to encourage self- analysis and stimulate career ideas. These tests are freely available on the internet.

The third learning outcome looks at how career ideas can be pursued and experienced both in and outside the workplace.

On completion of the unit, learners will have a practical understanding of and commitment to a career pathway, and be able to create a realistic career development plan.

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 Know how to use careers information	1.1 Identify sources of careers information to select for personal use 1.2 Outline careers pathways relevant to self 1.3 Describe emerging trends in ways of working that may impact on own career
2 Understand personal strengths and weaknesses relating to career choice	2.1 Undertake a skills audit to determine relevance and level of skills for a career choice 2.2 Describe new skills relevant to career choice
3 Be able to plan own career development	3.1 Identify options for work experience and training 3.2 Produce a career development plan to prepare for a specified career

Unit content

1 Know how to use careers information

Information sources: internet eg websites, careers centres; libraries eg books and directories; specialist centres eg careers telephone helplines, professional bodies, private careers organisations and consultants; education eg schools, colleges and universities; people currently in those careers

Career pathways: established routes of training and working recognised by independent professional bodies eg Royal College of Veterinary Surgeons, Security Industry Authority, Chartered Institute of Library and Information Professionals, The Law Society, Institute of Legal Executives; trends; national developments eg recession; international developments eg environmental/carbon footprint issues

Emerging trends: flexible working patterns eg portfolio working, part-time jobs, global working, European options, home based

2 Understand personal strengths and weaknesses relating to career choice

Career diagnostic tests: assessments eg skills, values, occupational interests; analysis eg details, findings, relevance, conclusions, validity and merit

Own career attributes: relevant work or other experience eg previous paid or voluntary work or work-based training; transferable skills eg good time management, prioritising workload, being able to work within a team, having good written and oral communication skills; achievements eg employee of the month, customer commendations, meeting targets, saving employer money, increasing turnover; qualifications eg gained from educational establishments and/or work-based training; interests eg special interests, hobbies that require skills useful for work; qualities which support work functions eg being self-motivated and confident, being creative, having initiative

3 Be able to plan own career development

Work experience: types eg temporary unpaid work placements, paid temporary work through an agency, shadowing, internal staff transfer, covering for absent staff, staff rotation

Training: types eg apprenticeships, employer and government funded work-based training to develop new skills eg Train to Gain

Career development plan: identifies clear career choice using planning eg set priorities, specific goals, realistic actions, utilising resources, progress reviews

Essential guidance for tutors

Delivery

As most of the unit concentrates on the unique needs and aspirations of learners, tutors need to ensure learners have as much flexibility as possible in terms of access to resources.

Information learners accumulate through self-assessment needs to be dealt with sensitively, and private information treated as confidential. Ground rules about these matters could be addressed with learners when introducing the unit.

It is recommended that learners are introduced to learning outcome 3 at the beginning of the unit so they understand that achieving the other learning outcomes will put them in a position to plan a career pathway. This will put future research and enquiry in its proper context.

Learning outcome 1 lends itself to individual or small- group work with regular feedback to the whole group to share useful findings, maintain focus and encourage exploration. Suitable sources of information will be careers centres, websites, newspapers, professional and trade bodies and their publications, Sector Skills Councils and workers already in the job being explored. Job profiles will be particularly useful in informing learners about specific careers and will provide details of sources of further information. Job profiles are available free online by accessing www.advice-resources.co.uk, and also, <http://careersadvice.direct.gov.uk>.

Learning outcome 2 could be delivered, in part, through a self-assessment questionnaire to ascertain personal attributes. Often learners find it easier to respond to a question, for example about a personal quality, than volunteer useful information in a timely fashion. Career diagnostic tests are freely available on the internet. The results from assessments could initially be interpreted and reviewed by learners in pairs. Feedback from pairs could then be discussed as a whole group to get other interpretations and ideas flowing.

A visiting guest speaker, such as a private careers consultant, could provide added motivation, inspiration, ideas and information on trends. Learners will need support in looking at national and global issues that could affect their career choice. These issues could include information on new legislation which introduces different requirements for working in the career, shrinking or expanding economies leading to changes in demand for the career, outsourcing work abroad reducing demand for the career, technological developments changing the shape of how work is carried out, an ageing population requiring different needs and changing demand for certain careers, climate issues causing businesses and householders to consider sustainability and changing consumer needs leading to the rise and fall in demand for different careers etc.

For learning outcome 3, learners could share their own experiences in an initial group discussion. Pooling ideas on how work experience and training can be achieved would provide a suitably expansive list which each learner could draw on and apply to their own situation. They will need to have carried out thorough self-assessment and careers research before learning outcome 3 can be achieved. A consultation with a careers adviser is required to ensure that each learner's career development plan is sound and in their best interests. If it is not possible for

learners to have a face-to-face consultation, careers advisers are available to give advice online and through national careers advice telephone services.

Learners up to 19 years of age who are still at school or college can go to www.connexions.gov.uk and talk individually to an adviser online. Adult learners (aged 20+) can access free careers assistance through the Next Step service by telephoning 0800 100 900.

It is recommended that a career plan template is discussed and agreed as a group activity. If learners all use the same template it will help to ensure the assessment criteria are met and will make marking easier.

Assessment

To meet 1.1, learners could collect and arrange, systematically, at least two pieces of information. One of these must be a relevant job profile and another must be from a careers adviser or other relevant professional. Information from telephone or face-to-face conversations needs to be recorded, preferably supported by appropriate evidence. For 1.2, learners should use information from 1.1 and outline career pathways that are relevant to them.

For 1.3, learners should identify at least two trends that may impact on their chosen career, and submit the information they have reviewed with a detailed analysis of why and how each trend may affect their career choice. Sufficient detail must be provided to show enquiry and that a practical conclusion has been reached.

For 2.1, learners should undergo a careers- related diagnostic test and supply the printed results as evidence of completion. Learners need to interpret the test results and review what they may or may not do differently in future in pursuit of their career aspirations, giving full reasons.

To achieve 2.2, learners must describe their career attributes through identifying their vocational skills and achievements, work experience, educational qualifications and interests, and the qualities they possess which support work functions. A CV they have prepared themselves can be used to provide some or all of the evidence.

For 3.1, learners need to provide details of the options generally available for work experience and training. They also need to assess which options they could pursue and specific details of how they would go about this.

For 3.2, learners must produce a detailed career plan. The timeframe for the plan should be decided by the learner but should cover a long enough span to show significant career progression. The plan could be produced after consultation with a careers adviser. Evidence of this consultation could be provided as record of the advice given, produced by the careers adviser.

The plan itself can be prepared from a set template and the content can be discussed and agreed with the tutor. The information contained within the plan must be prepared by learners and their career choice must be obvious. The plan should also record specific career goals. Realistic actions must be prioritised, appropriate resources utilised and progress reviews built into the plan.

Links to other BTEC units, other BTEC qualifications and other relevant units and qualifications

This unit forms part of the *WorkSkills from Edexcel* suite. This unit has particular links with:

Level 2 WorkSkills	Level 3 WorkSkills
Unit 2: Self-management Skills	Unit 2: Maximising Potential when Applying for a Job
Unit 10: Career Progression	Unit 3: Strategies to Improve Job Interview Skills
Unit 11: Developing Personal Skills for Leadership	Unit 9: Presentations for Work

Essential resources

Learners will need access to a careers centre, computers and telephones so that they can access reference materials, publications, careers advisers, websites, diagnostic tests and help/advice lines.

Websites

Advice resources	www.advice-resources.co.uk
Careers advice	https://nextstep.direct.gov.uk/Pages/Home.aspx?referrer=CAS
Connexions	www.direct.gov.uk/en/YoungPeople/index.htm

Unit 2: Maximising Potential When Applying for a Job

Unit code:	Y/503/2892
QCF Level 3:	BTEC Specialist
Credit value:	1
Guided learning hours:	10

Unit aim

The aim of this unit is to give learners knowledge and understanding of how to access suitable job vacancies, together with the skills needed to prepare documentation in support of job applications.

Unit introduction

Gaining employment that matches their skills and knowledge is usually the aim for learners who want to maximise their potential when applying for a job. This unit will help learners to develop the skills needed to compete in the job market and promote themselves. Learners will focus on job seeking and expand their understanding of where and how job opportunities can arise. Besides developing the skills needed to apply for a job, learners will consider their potential and work experience so far, and how they can utilise and build on this for their immediate benefit.

Learners will examine how to find advertised vacancies and how they can best evaluate which sources of information are most helpful to their personal situation. Learners can reflect on their achievements so far, to consider their career plans and ambitions and look for appropriate opportunities.

Learners need to research into the organisations they will apply to. Learners need to find out about the sector, financial viability of the company and as much as possible about the job vacancy to help inform their application.

Learners will concentrate on how to produce a letter of application and make their CV best match an advertised post using the information they have gathered.

On completion of the unit, learners will have the skills and knowledge to produce a letter of application which draws on their CV, the job advertisement and the person specification.

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 Be able to use sources of information to find job vacancies which maximise own potential	1.1 Research sources of information on job vacancies which match own skills and knowledge 1.2 Assess which sources are most appropriate for own purposes
2 Understand how to use organisation-related information	2.1 Explain how to gather information on organisations for job applications 2.2 Explain how information on organisations is used in job applications
3 Be able to prepare documentation to support a job application	3.1 Prepare a letter of application to match the key competencies for a specific job vacancy 3.2 Prepare a CV for a specified job vacancy

Unit content

1 **Be able to use sources of information to find job vacancies which maximise own potential**

Information: sources eg websites for employment agencies, trade and professional magazines, journals and publications, notices in shop windows, on noticeboards and vehicles, Jobcentre Plus, work colleagues and ex-work colleagues, schools careers office, Connexions, social networks, family

Assessment of job vacancy sources: match to own needs eg relevance to self, sector, type of work, number of adverts, frequency of updating, accessibility; cost, time

Maximising potential: how vacancies researched match to self eg skills, experience, knowledge, achievements, qualities and interests; job eg personal satisfaction, remuneration and benefits, travel to work, fit with other commitments, work-life balance; employer eg mission statement, reputation, geographical location, training, progression

2 **Understand how to use organisation-related information**

Sources of information: range eg websites, search engines, annual reports, articles, HR departments, employment agencies, personal contacts

3 **Be able to prepare documentation to support a job application**

Letter of application: formal layout eg addressed to a named person, tone eg persuasive, holds attention, conveys personality, refers to relevant skills, experience and achievements, does not repeat information in CV, structured, key competences matched to job, positive tone

CV: suitable format selected eg chronological, skills based or combination, information prioritised by relevance, easy to read and assimilate, skills and achievements highlighted, statistical support given to statements when possible, commercial font used, no graphics, text is clear and concise

Essential guidance for tutors

Delivery

Delivery of this unit would suit a workshop-style approach where learners have access to a variety of resources from which to research job vacancies. After clear instruction, group discussion, and possible question and answer sessions to check understanding, learners could be directed, in stages, to create their letter, CV and application form under supervision.

For learning outcomes 1 and 2 learners will need access to computers, printers, telephones and photocopiers so they can locate sources of job adverts and information about companies before producing their evidence. They will also need time to visit organisations such as their local Jobcentre Plus, Connexions centre, library, employment agencies, etc.

Group discussions or small- group work could be used to help learners decide on the criteria they will use to assess the different sources of job adverts.

Learners could create a chart where each source is compared against the same criteria, such as accessibility, cost etc, and this would be an effective way of displaying their individual assessments visually.

For learning outcome 3 tutors can provide examples of letters of applications, CVs for learners, in small teams or pairs, to discuss what works well and not so well. Question and answer sessions or quizzes on common traps and pitfalls could also add variety and reinforce learning. A variety of CV formats should be made available and the emphasis of each compared so that learners appreciate which style is best for which occasion. Tutors must emphasise that one CV is not going to be effective for all job applications and a targeted approach is needed so that a CV is adapted for the vacancy being applied for. At least one CV should be produced by each learner, as well as a letter of application. It is important to encourage learners to produce draft versions of these documents for review purposes.

To help focus learner attention, and add to the reality of the job market for learners, guest speakers from HR departments could be invited to talk about their organisation's recruitment and selection procedures and policies.

Guidance on how to complete application forms is provided on a range of websites. www.careersadvice.direct.gov.uk/helpwithyourcareer/appforms/sampleform is novel in that it provides an example application form which learners can click on to access advice on how to complete it.

Whilst assessment of this unit requires the completion of a paper-based application letter, discussions and practising of completing computer-based job applications would be helpful. If learners wish to experience completing a simulated online job application they can visit www.hull.ac.uk/careers/students-and-graduates/Application/index.html.

Assessment

To meet the assessment criteria for this unit, learners should identify at least two job vacancies that interest them. To identify these positions they will need to research sources of information, for example websites, media, Connexions. When undertaking this research, learners should record the information they found as evidence for 1.1. For 1.2, learners should give the advantages and disadvantages of each chosen source, ensuring that they refer to why they are appropriate, or not, for their purpose.

Before beginning the process of preparing a letter of application and CV, it is essential that learners know as much as possible about the organisation and position they are applying for. For 2.1 and 2.2, learners should gather as much information as possible and then use it as evidence of their understanding.

For 3.1 and 3.2 learners must produce a letter of application and CV for a specific job vacancy, ideally for the organisation already researched. The CV and application letter must demonstrate an understanding of the organisation and job learners are applying for and how it matches their own key competences.

Links to other BTEC units, other BTEC qualifications and other relevant units and qualifications

This unit forms part of the *WorkSkills from Edexcel* suite. This unit has particular links with:

Level 2 WorkSkills	Level 3 WorkSkills
Unit 4: Searching for a Job	Unit 1: Career Development
Unit 7: Interview Skills	Unit 3: Strategies to Improve Job Interview Skills

Essential resources

Learners need access to computers, printers, telephones and photocopiers so that they can locate sources of job adverts and produce their evidence. They will also need time to visit organisations such as Jobcentre Plus, Connexions, their local library, and employment agencies.

Websites

Careers advice	https://nextstep.direct.gov.uk/gettingajob/Applicationsandinterviews/Pages/default.aspx
Direct Gov	www.direct.gov.uk/en/Employment/Jobseekers/index.htm
Direct Gov	www.direct.gov.uk/en/YoungPeople/Workandcareers/Gettingyourfirstjob/index.htm
Hull University	http://www2.hull.ac.uk/student/careers/careerplanning/makingthetransition/makingapplications.aspx
The Open University	www.open.ac.uk/careers/applying-for-jobs.php

Unit 3: Strategies to Improve Job Interview Skills

Unit code:	D/503/2893
QCF Level 3:	BTEC Specialist
Credit value:	2
Guided learning hours:	15

Unit aim

The aim of this unit is to give learners knowledge and understanding of interview preparation, whilst developing their confidence through practising and reflecting on interview techniques.

Unit introduction

The labour market is becoming increasingly competitive and in this unit learners will develop skills to ensure they promote their skills, qualities and experience to obtain employment. Learners will have the opportunity to build on skills gained from previous interview experience and approach interview preparation and being interviewed with greater confidence. Although the unit concentrates on being interviewed for a job, the skills developed are transferable to any interview situation, such as college applications or joining a club or society.

Learners are encouraged to consider past performance and then explore the steps they need to take to prepare for a job interview. Learners will appreciate the different methods of assessment they may face and the questions they could be asked. They will also consider what answers to give and explore the effect of non-verbal communication. Finally, learners will be able to apply their knowledge and understanding and practise being interviewed.

On completion of the unit, learners will be able to reflect on their interview performance and have a clear understanding of how to improve their interview technique.

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 Know how to prepare for a job interview	1.1 Identify strengths and areas for improvement in relation to own previous interview performance 1.2 Describe the steps needed to prepare for an interview using previous experience
2 Understand what is expected in an interview situation	2.1 Explain what employers expect from interview candidates 2.2 Prepare interview questions and answers for a specific job role 2.3 Compare methods of assessment used at interviews 2.4 Explain types of presentation required at interviews
3 Be able to participate in an interview	3.1 Demonstrate appropriate behaviours in an interview 3.2 Describe how body language, tone of voice and facial expressions may affect an interview
4 Be able to reflect on own interview performance	4.1 Review interview performance against expectations and preparation 4.2 Recommend improvements for own interview performance

Unit content

1 Know how to prepare for a job interview

Reflection on own previous performance: previous interview performance eg usefulness of preparation, ability to show how skills and experience are ideal for the job, utilising opportunities to show relevant achievements, anticipation of questions, quality and effectiveness of answers, use of appropriate body language, facial expressions, tone of voice, use of relevant questions, ability to give a presentation and/ or pass assessments

Practical preparations: arrangements eg confirm attendance, find out what type of interview eg informal, formal, one to one, panel, group; research and understand information about the employer and job vacancy, anticipate questions, prepare and rehearse appropriate answers, questions to ask; travel, timing, collect documents/paperwork to take eg notes, questions, certificates; avoid anxiety eg talk to friends and family, recall achievements, use perspective, deep breathing; personal preparation eg suitable clothing, shoes hair, make-up, personal hygiene

2 Understand what is expected in an interview situation

Employers expectations : being prepared eg knowledge of organisation, have questions ready, know application information, read job and person specification, punctuality, appropriate dress, politeness

Questions: direct eg why do you want to work here? have you done this kind of work before?; indirect eg tell us something about yourself?; discursive eg where do you see yourself in two years time?; reflective eg what do you consider to be your weakness?; information giving eg how did you travel here? what experience do you have with IT?; range of examples eg why should we employ you? why did you leave your previous job? what are your career goals and aspirations?

Answers: presenting information eg verbal, handouts; relevant information, clear and concise; check understanding

Assessment activity: personality eg Myers Briggs, insight; skills, levels of competence, presentations; methods eg assessment days, tests, paper, online, oral, discussion groups, meetings, assessment centres

Presentation: types eg oral, using ICT eg PowerPoint; focused, being original, keeping to brief and time

3 Be able to participate in an interview

Answering: eg being inspiring, confident, expanding on information, providing appropriate evidence, generating interest, using appropriate method of delivery, keeping to time, not talking too much

Questioning: purpose eg to clarify about the job and/or organisation, ensure relevance, being confident

Body language: appropriate dress, posture, eye contact, tone and pace of speech, facial expressions, proximity, greetings eg handshake

4 Be able to reflect on own interview performance

Recommended improvements for own performance: self-reflection on outcomes eg rehearse answers to anticipated questions, maintain more focus, exercise more self-discipline, pause and think before answering, request clarification, review useful information before the interview for better recall, gain a greater appreciation of own abilities, make more effort with presentations, be more aware of own body language, make more effort to dress appropriately, improve timing

Essential guidance for tutors

Delivery

It will be essential for learners to have ample opportunity to practise their interview technique. Feedback from tutor and peer observations will be helpful. Learners will benefit from visual as well as oral feedback, so the use of video/DVD recording would be extremely helpful. Audio recording equipment would also be useful to enable learners to hear the pitch, pace and tone of their voice during interviews.

Tutors should ensure learners have a good understanding of how to use the equipment and that they are used to being recorded. As part of preparing to deliver the unit it would be helpful for tutors to collect a selection of job adverts (and the job and person specifications that support them) for vacancies that would be realistic for learners to fill.

Another important aspect of delivery will be encouraging learners to share their interview experiences, both their successes and their less enjoyable experiences. This can be used to develop and expand on the subject and will keep the unit relevant for learners.

After the initial introduction to the unit, learners could think about the interviews they have had. In preparation for learning outcome 1, they could list what the interviews were for and who interviewed them. Learners could work in pairs to discuss how those interviews went (the tutor may have to encourage learners to recollect and share this information). Learners could then record their reflections. If not many learners have had interviews this exercise could be postponed until after all learners have experienced mock interviews. Learners could then reflect on their experience of the mock interviews.

A tutor-guided group discussion on preparing for interviews would be a good foundation which learners could refine and then produce their own work. Tutors could also refer learners to sources of further information, for example websites, DVDs and career textbooks.

For learning outcome 2, a group discussion, or learners working in pairs and feeding back to the group, could be used to examine what employers expect from interviewees. It will be important for learners to put themselves in the shoes of employers and ensure they restrict their thoughts to thinking about the interview process and not doing the job itself.

In relation to methods of assessment, tutors could provide a selection of examples for learners to consider and compare in small groups. These could be obtained from the centre's own HR department or through other employers.

In preparing to cover the subject of interview questions and answers, tutors could provide a job advert and supplementary information, such as a company leaflet, website pages, job and person specifications, and ask learners to work individually, in pairs or small teams to record questions that could be asked. Discussion on these questions could then follow. Tutors could also explain about the classification of questions and the importance of open-ended questions to an interviewer etc.

Tutors could supply personal, educational and employment details for a fictitious interviewee. The group could then form different pairs or teams and answer the questions for the interviewee. They could also explain the different ways information could be given to the interviewer in addition to verbally, for example by handouts or presentations. On completion, answers could be compared to see who produced the clearest and most persuasive ones, and why. This could provide sufficient ground work for learners to develop their own questions and answers for a job vacancy they could apply for. Learners can use the same advertisement they worked on earlier for interview preparation.

How to give presentations at interviews and the topics that may be requested could be delivered by drawing on learner and tutor experiences. Information for discussion could also be sourced from websites and careers books.

For learning outcome 3, learners will need to practise what they have learned. Mock interviews with tutors or other designated members of staff, or if necessary other learners, preferably recorded for comprehensive feedback, will be a good foundation for improving their technique. If peers are interviewing or observing, ground rules on how to give appropriate feedback should be covered. If resources permit an interview panel would be good for interviewees to experience.

The interviewer can use the job advertisement used by learners to describe interview preparation and likely questions and appropriate answers (1.2 and 2.3) for the first interview.

Body language, tone of voice and facial expressions could be delivered through tutor-led demonstration and group discussion. Learners could be asked to research the subject further, drawing on information in textbooks and websites.

Learning outcome 4 can be achieved by learners identifying the improvements they believe they could make to their interview performance, immediately after their mock interviews. The tutor can draw out suggestions from learners about minor or major improvements. This should follow on from time spent reflecting on how learners performed in comparison with their initial expectations and preparations, as recorded for learning outcome 1.

Assessment

To meet 1.1, learners can draw on any interview situations if they have not yet experienced a job interview (for example interview with a tutor for a college course, interview by charity staff for voluntary work). If learners have no prior interview experience at all, they can draw on their performance in the mock interviews for this unit.

Learners must give a reasoned account of their performance, with examples to support statements of what went well and not so well and how they think this affected the outcome. They may draw on any aspect of the interview, including tests undertaken and presentations given.

To achieve 1.2, learners need to give a thorough account of how they would prepare for a job interview. They could explain how they would prepare for a job vacancy they have selected. Learners should not use the same job adverts. To achieve 2.1, learners need to provide sufficient information that another learner could use to achieve success at an interview. Learners could present this information as a factsheet or guidance note for interviewees. Individual work is expected, although ideas may have been generated in group work beforehand.

For 2.2, learners must state at least two questions that could be asked in relation to an advertised job vacancy they have found that is suitable for them. This could be the same job advert they used for 1.2. Answers to these questions should be given on the basis that they are the interviewee and should be persuasive and show individual preparation.

For 2.3, learners must compare at least two features of two different methods of assessment and record their findings in writing. The features chosen should be left to the learner's discretion but tutors could provide a range from which they should be selected. Examples include subject matter, time taken to complete the assessment, resources required by the interviewee to complete assessment, cost to the interviewee, cost to the employer, preparation, and benefits to the interviewer and interviewee.

For 2.4, learners need to explain the different ways in which they can deliver presentations in an interview. Reference to the use of technology and/or documentation is expected, as are examples, in broad terms, of the likely subject matter. For 3.1, learners need to demonstrate their ability to answer questions effectively, ask relevant questions, manage their body language, and participate appropriately (for example demonstrate rapport building, good manners, patience and respect) in a mock interview with a designated person or persons. The interview could be based on the job vacancy they used for 2.1 and 2.2.

Evidence could be provided by the tutor completing a checklist of observations. The checklist needs to have some space to record why the criteria were met. For example, if a box is ticked to indicate effective answers to questions space needs to be provided for the reasoning, such as 'learner referred to key skills and achievements, and gave examples of relevant experience'. Alternatively, the interview performance can be video recorded and the tutor can complete a declaration that the assessment criteria were met.

For 3.2, learners need to describe in words (they can also use actions if that is helpful) how body language, tone of voice and facial expressions may affect the outcome of an interview. Learner evidence will ideally be recorded on video, but may also be written or recorded on audio tape. Descriptions must be detailed enough to show a clear understanding of these subjects, sufficient to enable the learner to adhere to interview etiquette.

For 4.1, learners are expected to reflect on their interview performance, and compare how they did with their expectations and preparation from 1.1 and 1.2. This could be through discussion, or in a tabulated or checklist format.

For 4.2, learners need the opportunity to discuss how they might improve their interview performance with the tutor or a designated person. This discussion should lead to learners independently providing improvements that could be made. The improvements should be described showing a clear and unequivocal understanding of what the learner needs to do. This information could be written or recorded on audio or video tape.

Links to other BTEC units, other BTEC qualifications and other relevant units and qualifications

This unit forms part of the *WorkSkills from Edexcel* suite. This unit has particular links with:

Level 2 WorkSkills	Level 3 WorkSkills
Unit 5: Applying for a Job	Unit 2: Maximising Potential when Applying for a Job
Unit 6: Preparing for an Interview	Unit 9: Presentations for Work
Unit 7: Interview Skills	Unit 12: Negotiation Skills and Persuasion in the Workplace

Essential resources

Learners will need access to job vacancy information. They must be given the opportunity to participate in simulated interviews. Audio and video recording equipment will be useful for delivery and assessment.

Websites

Chartered Institute of Personnel and Development	www.cipd.co.uk
Direct Gov	www.direct.gov.uk
JobCentre Plus	www.jobcentreplus.gov.uk
The Open University	www.open.ac.uk
Work Smart	www.worksmart.org.uk

Unit 4: Preparing for Work Placement

Unit code:	H/503/2894
QCF Level 3:	BTEC Specialist
Credit value:	1
Guided learning hours:	10

Unit aim

The aim of this unit is to give learners knowledge and understanding of the preparation needed to gain maximum benefit from work placements, including setting goals for skills development.

Unit introduction

Work placements give learners practical experience of the work environment and the opportunity to develop a wide range of personal and professional skills, which enhance their overall employability. Good preparation is crucial to ensuring learners gain the most from this experience.

It is important for learners to know about their placement organisation before they work there, and in this unit they will conduct research into the type, structure and function of the organisation. In order for learners to understand their responsibilities and expectations during the placement, they will need to know why it is important for an organisation to have policies and procedures in place, particularly for health and safety. This unit will give learners the opportunity to examine different policies and procedures relevant to their role.

Work experience gives learners the opportunity to practise and develop their personal and work skills. Learners will match the expected skills and responsibilities of the work placement and conduct a self-analysis setting goals for developing these skills during the work placement.

Some learners may be on a long-term work placement and, in this case, it may be possible to assess different learning outcomes from a range of units in this specification. Although the term 'organisation' has been used throughout this unit, it can refer to any type of work placement the learner is preparing for.

On completion of the unit, learners will have the skills and knowledge needed to set specific, realistic goals for developing personal and work skills during their work placement.

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 Know about the placement organisation	1.1 Describe types of organisation 1.2 Identify placement organisation type 1.3 Outline the structure of the placement organisation 1.4 State the function of the placement organisation 1.5 Describe the sector the placement organisation operates in
2 Understand the expectations and responsibilities of the individual in work placement	2.1 Explain the responsibilities of the individual in a work placement 2.2 Explain the employer expectations of the individual in a work placement
3 Be able to set goals for developing personal and work skills on work placement	3.1 Analyse own personal and work skills 3.2 Produce specific, realistic goals for developing personal and work skills on placement

Unit content

1 Know about the placement organisation

Type of organisation: different types eg public limited company, private limited company, local authority, partnership, sole trader, franchise

Structure of organisation: aspects eg aim, role, organisational charts, staff organisation, learner's role and place in structure

Function: scope and purpose of business eg national, international, global, sales, services profit, not for profit

Sector: types eg finance, law, education management, hospitality, medicine, engineering, retail, social care, public services

2 Understand the expectations and responsibilities of the individual in work placement

Responsibilities: know about health and safety eg organisational policy, moving and lifting, protective clothing and equipment, first aid, fire safety, food hygiene; types eg dress code, punctuality, recording and reporting, methods and reasons for sharing information, confidentiality, respect for diversity

Expectations: to include eg teamwork, communication and interpersonal skills, business etiquette; specific tasks eg administration, stock control, archiving, arranging meetings, work shadowing; completion of learning log, signatures eg supervisor, mentor

3 Be able to set goals for developing personal and work skills on work placement

Analysis of personal and work skills: methods eg use strengths and weaknesses analysis tool, SWOT analysis, reflect on past performances and achievements, consider feedback from tutors, supervisors, mentors

Personal and work skills: personal skills eg communication, self-confidence, assertiveness, flexibility, positive approach; work skills eg IT, teamwork, note taking, meeting attendance, punctuality, telephone manner

Goal setting: goals should be eg realistic to placement expectation and responsibilities, SMART (specific, measurable, achievable, realistic, time-bound), related to career aims

Essential guidance for tutors

Delivery

Learners will attend different work settings for their work placement experience and develop their own personal and professional work skills. However, this unit provides an opportunity to learn about the structure and functions of different organisations and the generic responsibilities and expectations of employees which can be applied to any work situation. Delivery of this unit therefore enables learners to undertake independent research, give presentations and participate in discussions. Guest speakers will help learners relate the unit content to the workplace.

To introduce learning outcome 1, the tutor could discuss with learners the importance of knowing about the structure and function of the organisation, including the 'big picture', before focusing on individual roles and responsibilities. Learners could carry out individual research about their organisation. Information about the type of organisation, its structure, sector and function may be gathered from the internet, marketing brochures for the organisation, the careers office or from the employer during a pre-placement interview. Learners could present their research to the group. This would give them the opportunity to appreciate the range of organisational types, structures and functions.

For learning outcome 2, a representative from an HR department could be invited to speak about the responsibilities of the employer and employee with regard to work experience. Learners could work in groups to analyse policies and procedures from a range of different departments and organisations. Learners could find out information about health and safety and other aspects of work that apply to them. Specific information about health and safety can be found on the Health and Safety Executive website, www.hse.gov.uk.

Ideally, learners will have an interview with the employer before starting their placement, or will be given placement guidance which will enable them to understand information specific to their work role. An interview will give learners the opportunity to clarify the specific tasks they will be required to undertake during the work experience. Alternatively, a placement provider could be invited as a guest speaker to discuss the generic expectations and responsibilities of learners during work placements and the reasons for the expected standards.

How to conduct a skills audit could be discussed as a group. Learners should be encouraged to share their experiences of self-assessment. The tutor could demonstrate how to use SWOT analysis as a self-assessment tool through a case study. Personal and work skills could be clarified before learners work independently to analyse their skills. The concept of goal setting may be new to learners and group discussion could focus on how to set goals for the work placement to develop personal and work skills identified as a result of the skills audit. Tutors should emphasise the need to match the goals to the particular expectations and responsibilities of the work placement. How to use a goal setting tool such as SMART targets could be demonstrated by the tutor.

Assessment

The assessment criteria for this unit could be covered in one assessment task compiling a booklet for learners to refer to in their work placement. Other forms of evidence may be used, such as videos or presentations about going on work experience. It is essential that learners produce their own individual work, which concentrates on their particular work placement taken up.

For 1.1-1.5, learners must give clear details about their work placement, including facts about the sector the organisation operates in and the function and structure of the organisation. Evidence for the structure may be in the form of an organisational chart and a brief background of the organisation.

For 2.1, learners need to explain the specific expectations and responsibilities of their work placement. Their response must refer to the health and safety policy and procedures of their proposed work placement, as well as other policies and procedures relevant to their role.

For 2.2, learners need to give details about what will be required of them and all the tasks that they will be expected to perform in their proposed work placement. The explanation should include the expected standards and how completion of tasks will be recorded.

For 3.1, learners need to examine the strengths and weaknesses of their personal and professional work skills. A self-analysis tool may be used to present the evidence but other forms of evidence may be used.

For 3.2, learners need to give targets for the development of the personal and work skills they intend to improve on during the work placement. The goals must be practical in terms of the time available and the tasks the individual will be performing, and relate to the self-analysis in 3.1.

Links to other BTEC units, other BTEC qualifications and other relevant units and qualifications

This unit forms part of the *WorkSkills from Edexcel* suite. This unit has particular links with:

Level 2 WorkSkills	Level 3 WorkSkills
Unit 15: Effectiveness at Work	Unit 1: Career Development
Unit 16: Working in a Team	Unit 5: Reflecting on Work Placement
Unit 17: Learning from More Experienced People	Unit 9: Presentations for Work

Essential resources

To achieve this unit, learners must be preparing to go on a suitable work placement. Employers must be prepared for upcoming work placements to support learners in gathering relevant information.

Websites

Health and Safety Executive	www.hse.gov.uk
National Council for Work Experience	www.work-experience.org
Skills self-assessment audit	www.surrey.ac.uk/Skills/pack/audit.doc
SMART goals	www.projectsart.co.uk/smart-goals.html
SWOT analysis method and template	www.businessballs.com/swotanalysisfreetemplate.htm

Unit 5: Reflecting on Work Placement

Unit code:	K/503/2895
QCF Level 3:	BTEC Specialist
Credit value:	1
Guided learning hours:	10

Unit aim

The aim of this unit is to give learners the opportunity to reflect on the development of skills in their work placement.

Unit introduction

Work placements give learners the opportunity to gain practical experience in the real world and to develop a wide range of personal and professional skills which can increase their confidence, maturity and employability. In this unit learners will develop and apply the skills of reflection through reviewing their experience on work placement. By identifying positive and negative aspects of their performance, learners will be able to plan ways to build on or improve these in the future. The skills of reflection take time and practise to develop and can be applied to any learning experience, helping learners to improve their performance in other areas.

Although this unit has been designed to be taken after learners have experienced a work placement, they will need to gather evidence during their work placement to complete the required assessment for this unit.

This unit will help learners to understand the benefits of work placement for their own development. They will explore how reflection can help the individual develop personal and work skills and gain a deeper understanding of the concept of structured reflection.

On completion of this unit, learners will be able to reflect on the personal and work skills they demonstrated during their work placement period.

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 Know the benefits of work placement for own development	1.1 Identify the benefits for self-development from work placement 1.2 Describe the benefits for self-development from work placement
2 Understand the role of reflection in supporting the development of personal and work skills	2.1 Assess ways reflection can be used in a work placement 2.2 Explain the benefits of reflection on a work placement to develop personal and work skills
3 Be able to reflect on skills and knowledge demonstrated during work placement	3.1 Summarise skills and knowledge demonstrated during work placement 3.2 Analyse skills and knowledge demonstrated during work placement

Unit content

1 **Know the benefits of work placement for own development**

Benefits: skills developed eg IT, communication, telephone, interpersonal, time management, meeting deadlines, attending meetings, responsibility, prioritising, organising, liaising, personal and professional

2 **Understand the role of reflection in supporting the development of personal and work skills**

Personal and work skills: personal skills eg communication, self-confidence, assertiveness, flexibility, positive approach; work skills eg IT, teamwork, note taking, meeting attendance, punctuality, telephone manner

Reflection: types of reflection eg reflection-in-action, thinking on your feet and reflection-on-action, retrospective thinking, Kolb's learning cycle, structured approach, reflective journal

Benefits of reflection: learning from experience eg standing back gives wider perspective, encourages individuals to be honest, make balanced judgements, allows clarity of issues, gives insight, conclusions can be drawn about ways personal and professional skills can be developed or changed, application to work and learning

3 **Be able to reflect on skills and knowledge demonstrated during work placement**

Evidence: types eg reflective practice journal, witness statements eg from supervisor, tutor, mentor, customers

Reflection on personal and work skills: stages in reflection eg description (what happened? what was the context?), analysis (what went well? what was less successful? why did I do what I did?), clarification (were goals met? what needs to be done differently? why does it need to be approached differently?), action (what to do next? how?), short- and long-term actions identified

Essential guidance for tutors

Delivery

To achieve this unit, learners must have experienced a work placement. The length of time to be spent in the work placement is not prescribed, but sufficient time must be given to enable learners to achieve the assessment criteria. It is essential that learners produce their own individual work, which concentrates on their particular work placement.

Learners will be expected to gather evidence of planned goals and tasks they were involved in during their work placement. It is important to recognise that there might be opportunities to assess learning outcomes from a range of units in the specification through evidence and experience gathered on the placement.

Tutors could introduce learning outcome 1 before learners start their work placement. Learners need to think about the benefits of work experience for them individually. They could record what they expect from the placement, and then reflect on how accurate their expectations were once the placement is finished. Tutors could use a case study of a work placement and relate the experiences to Kolb's learning cycle on the board/flipchart. Learners could work in pairs to map different case studies of practical work experience to the learning cycle.

Tutor-led discussions could explore how reflection can help individuals develop personal and work skills and knowledge, and the importance of self-appraisal needs to be explored. Learners could develop a format for recording reflections in a journal as a group exercise. Learners should be reminded of the need to comply with the policy of the placement organisation regarding confidentiality and data protection. Learners could work in groups to devise a series of questions that could be used to aid reflection and share their suggestions with the other learners, which could be compiled into the reflective journal for all learners to use.

Learning outcome 3 could be delivered after the work placement has been completed. A discussion could be used to establish the evidence that could be used to aid reflection. Each learner could describe one experience from their work placement, give a short presentation and demonstrate how they used the stages of analysis, clarification and action in relation to one aspect of their personal or professional skills.

Assessment

For 1.1 and 1.2, learners need to identify and describe the benefits for self-development from work placements. A minimum of two benefits should be identified with a description of how learners have benefited personally. This could be written, given in a presentation or form part of a report.

For 2.1 and 2.2, learners need to give a clear assessment of the different ways in which reflection can help the development of their personal and work skills. They need to demonstrate an understanding that reflection allows individuals to learn from experience. Examples may be given to support their response. Again this could form part of a report or come from a reflective journal.

For 3.1, evidence of the personal and work skills demonstrated during work placement could be collected from reflective journals, learning logs or witness statements. Learners need to draw the information together in a clear and precise way. Learners could annotate their learning log/reflective journal or provide a précis of the personal and work skills they demonstrated. The documents alone will not provide the evidence required.

For 3.2, learners need to scrutinise the personal and work skills and knowledge they demonstrated in their work placement. This must include successful aspects and aspects that were less successful and why actions were taken. Learners must consider what aspects need to be approached differently and give reasons for this. They need to reflect on the effectiveness of achieving goals they planned for work placement and give actions to further develop both their personal and work skills.

Links to other BTEC units, other BTEC qualifications and other relevant units and qualifications

This unit forms part of the *WorkSkills from Edexcel* suite. This unit has particular links with:

Level 2 WorkSkills	Level 3 WorkSkills
Unit 15: Effectiveness at Work	Unit 1: Career Development
Unit 16: Working in a Team	Unit 4: Preparing for Work Placement
Unit 17: Learning from More Experienced People	Unit 9: Presentations for Work

Essential resources

Learners must have undertaken a period of work placement before starting this unit.

Websites

Leaflet about reflection	www.qmu.ac.uk/ELS/docs/Reflection.PDF
Reflection, Kolb's learning cycle, reflective journals	www.practicebasedlearning.org

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 the benefits of confidence for work	1.1 Analyse examples of confident behaviour for work 1.2 Explain benefits of confidence for work
2 Understand how confidence is supported by assertive behaviour	2.1 Examine situations of assertive behaviour 2.2 Explain how behaving assertively develops confidence
3 Understand how to develop confidence for work	3.1 Analyse ways to improve own confidence at work 3.2 Produce a plan to improve own confidence for work

Unit content

1 Understand the benefits of confidence for work

Confident behaviour: manifestations eg belief in one's own abilities, limited concern about what others think, speaking up, giving your best body language eg posture, eye contact, facial expressions, gestures, verbal eg tone of voice, expression; positive approach eg clear goals, specific aims; consequences eg ability to stay calm, ability to manage criticism, ability to admit and learn from mistakes

Benefits to work: eg inspire confidence in others, willing to take on challenges, better able to take informed risks, ability to tolerate uncertainty, ability to make decisions

2 Understand how confidence is supported by assertive behaviour

Assertive behaviour: eg protecting one's rights without anger or aggression, right to say no, right to disagree, right to be responsible only for yourself and own actions, right to make mistakes, respecting the rights of others, listening, clarity of expression, having honest discussions, negotiating, taking the lead, clarifying expectations, making decisions

Benefits of behaving assertively: eg increased confidence, self-worth, resolution of problems where rights of all parties are recognised, others can be persuaded without bullying, enriched relationships

3 Understand how to develop confidence for work

Ways to improve confidence: techniques eg utilising self-awareness, record achievements eg SWOT (strengths, weaknesses, opportunities and threats) analysis; consider what aspects of self-confidence are important eg giving a presentation, interview skills, dealing with a complaint, set small goals, identify skills required to achieve goals, be positive, use visualisation, practise, learn how to handle failure, make goals more challenging, use a mentor

Essential guidance for tutors

Delivery

Tutors delivering this unit have the opportunity to use a wide range of techniques including presentations, role play and guest speakers. Additional learning resources can include journals, videos, DVDs, case studies, learner presentations and group work.

When introducing this unit, tutors could help learners to identify individuals who exhibit confident behaviour. This may be achieved through discussion or a thought shower exercise. Learners could work in small groups to analyse videos of people in different situations, for example being interviewed or performing and answering questions, to identify confident behaviour.

A group discussion could follow to establish the behaviour confident people demonstrate including interpersonal and communication skills, non-verbal skills, positive approaches and responses to criticism. The benefits of confidence at work could be explored by inviting a guest speaker, such as an employer or human resources manager, to talk to learners. Learners could prepare questions to ask about how the organisation benefits from having confident employees.

To introduce the topic of assertiveness for learning outcome 2, the tutor could ask learners to give examples of situations they have observed where a customer is complaining about a purchase or poor service. The tutor could then take the role of a dissatisfied employee behaving aggressively in a role-play demonstration, for example complaining to the line manager about having to work overtime at the weekend. Tutor-led discussion about the difference between assertive and aggressive behaviour could follow, for example keeping calm and considering the feelings of others versus shouting and confrontational behaviour. Learners should work in groups to suggest how the employee could behave assertively, rather than aggressively, in the role-play situation. Learners feed back to the group by role playing assertive behaviour. In the group discussion, learners could agree guidelines for assertive behaviour in the workplace.

Learners could analyse a case study showing the successful resolution of a workplace conflict where assertive behaviour is used, for example a performance review by a manager concerning the employee's poor time management skills. The employee listens carefully, keeps calm in the face of criticism, has an honest discussion and agrees expectations. Discussion could follow about how successful resolution helps the employee to feel confident by taking responsibility for their own actions and showing positive, considerate and professional behaviour.

For learning outcome 3, learners could work in pairs to research how to assess confidence, for example questionnaires or SWOT analysis, and present their findings to the group. Learners could work individually to assess confidence and conduct research on how to develop their confidence to benefit them at work.

Assessment

This unit can be assessed through a series of structured tasks including a mixture of theory and practical application.

To achieve 1.1, learners must give examples of confident behaviour. This may be achieved through a description of different work-based scenarios which illustrate learners role playing key behaviours. Other forms of evidence could include videos of work-based situations.

For 1.2, learners must explain how confidence is an advantage for the individual at work in at least two different ways. The explanation may be supported by examples.

For 2.1, learners must provide details of at least two different behaviours which show assertiveness. Evidence may be scenarios which are videoed. Alternatively, evidence may be descriptions of scenarios where the breadth of assertive behaviours is demonstrated.

For 2.2, learners must make the link between assertive behaviour and confidence. They need to clarify how behaving assertively supports the confidence of the individual. Examples from work scenarios can be used to support their response.

For 3.1, learners could complete an analysis of their confidence, for example a SWOT analysis. At least two strengths, weaknesses, opportunities and threats should be identified and assessed.

For 3.2, learners should use the analysis and consider different ways in which they can plan to build on their confidence.

Links to other BTEC units, other BTEC qualifications and other relevant units and qualifications

This unit forms part of the *WorkSkills from Edexcel* suite. This unit has particular links with:

Level 2 WorkSkills	Level 3 WorkSkills
Unit 5: Applying for a Job	Unit 2: Maximising Potential When Applying for a Job
Unit 6: Preparing for an Interview	Unit 3: Strategies to Improve Job Interview Skills
Unit 7: Interview Skills	Unit 8: Personal Skills for Leadership
Unit 18: Building Working Relationships with Colleagues	Unit 12: Negotiation Skills and Persuasion in the Workplace
	Unit 16: Recognition and Resolution of Bullying in the Workplace

Essential resources

There are no essential resources for this unit.

Indicative reading

Back K and K — *Assertiveness at Work: A practical guide to handling awkward situations* (McGraw-Hill, 2005) ISBN 0077114280

Burton K and Platts B — *Building Self-Confidence For Dummies* (John Wiley & Sons, 2005) ISBN 0470016698

Websites

Practical exercises for confidence building	www.bbc.co.uk/relationships/improving_your_confidence
SWOT analysis template	www.businessballs.com/swotanalysisfreetemplate.htm
Tips and links for further reading	www.businessballs.com/self-confidence-assertiveness.htm
Tips for developing self-confidence and video	www.mindtools.com/selfconf.html

Unit 7: Organising and Chairing Meetings

Unit code:	T/503/2897
QCF Level 3:	BTEC Specialist
Credit value:	1
Guided learning hours:	10

Unit aim

The aim of this unit is to give learners knowledge and understanding of the arrangements for organising meetings, together with the opportunity to develop the skills needed to chair a meeting.

Unit introduction

Meetings are held at all levels throughout an organisation and are an essential vehicle for giving and obtaining information, for discussion and agreement. How formally they are conducted and who should participate depends on their purpose.

Discussions on company policy, planning organisational structure and growth would be formal matters for a partnership or board of directors, and therefore formal procedures would be followed. However, a discussion about the annual office party could be an informal meeting amongst colleagues. In this unit learners will explore the different types of meeting that take place in the workplace and become familiar with their appropriate structure and attendance.

Learners will develop an understanding of the roles and responsibilities of the main officials and attendees of a formal meeting. They will examine the organisation of meetings including venue and catering arrangements, all associated documentation and meeting structure, content and timing.

This unit gives learners the opportunity to practise the skills required to manage and control a meeting through their application in a formal meeting situation. This will enable them to build on skills such as listening, time management and summarising information.

On completion of this unit, learners will have experienced preparing for and chairing a meeting and will assess their own contribution to the meeting, the skills they have developed and those they need to build on.

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 Know how to organise meetings	1.1 Describe types of meeting 1.2 Outline the preparation required for a meeting
2 Understand how the responsibilities and actions of individuals can influence a meeting	2.1 Explain how the chair can influence a meeting 2.2 Explain how the secretary contributes to a meeting 2.3 Explain the responsibilities of attendees
3 Be able to chair a meeting	3.1 Identify the skills needed to chair a meeting 3.2 Demonstrate the skills required to successfully chair a meeting
4 Be able to review own meeting skills	4.1 Assess own skills used in chairing the meeting 4.2 Recommend improvements to own chairing skills

Unit content

1 Know how to organise meetings

Meetings: informal eg ad hoc team meetings, corridor meetings; formal eg AGM, board meetings, team meetings, governors' meetings, parish council meetings

Preparation: tasks eg book venue and catering, identify purpose and aims of a formal meeting; paperwork eg notice of meeting, agenda, papers and documents to support agenda items, previous minutes; needs of attendees eg diet, access, disabilities; use of scheduling software

2 Understand how the responsibilities and actions of individuals can influence a meeting

Responsibilities of the chair: role eg approve agenda, set timings for agenda items, ensure timings are adhered to during meeting, open meeting, sign previous minutes when approved, ensure only one person speaks at a time, ensure all members' views are heard for each agenda item, remain impartial; influence eg take votes on agenda items requiring decisions, does not vote but holds casting vote for split decisions, summarise discussions after each agenda item, gain agreement for date of next meeting, close meeting

Responsibilities of the secretary: role eg arranges suitable venue and refreshments for the meeting, prepares all paperwork according to set structure, sends out notice of meeting and coordinates responses, sends out agenda and associated documentation, informs chair of notified absentees; contribution eg sits to the right of the chair during the meeting and takes notes of discussions and the chair's summary of each agenda item, produces minutes to set structure from notes, distributes minutes to all meeting members

Responsibilities of attendees: attendees represent different areas of organisation eg finance, marketing, sales, operations, research and development; role eg respond to meeting notification, prepare responses to agenda items, attend meetings; contribute to discussions, vote on issues

3 Be able to chair a meeting

Skills required: planning eg preparing, time management of self and others, leadership; coordinating eg ensuring discussions remain focused and only one person speaks at a time; communication eg listening and reflecting back to demonstrate listening, encouraging participation and ensuring discussions are not dominated, summarising discussions, remaining impartial, allowing the majority vote on issues

4 Be able to review own meeting skills

Own performance: review eg evaluate own skills applied when conducting the meeting and compare with those that are required eg planning, communicating, summarising, controlling, being impartial

Areas for improvement: identify areas for improvement and how these will be improved eg training, observing, role play

Essential guidance for tutors

Delivery

The emphasis of this unit is on enabling learners to identify and practise the skills needed to participate in and chair a formal meeting. They will need to recognise that there are different types of meeting, with varying degrees of formality, and the documentation associated with them. They will need to understand what must be done before a formal meeting in terms of both practical arrangements and document preparation. They will also need to understand the roles and responsibilities of key members and attendees of a meeting to demonstrate the skills needed to chair a meeting.

As an introduction to the subject and in order to meet learning outcome 1, learners could work in small groups to discuss and identify meetings in which they have been involved, other meetings they are aware of, and what preparation, if any, might be needed for each type of meeting. These discussions could then be broadened out to include the whole group and lead to the compilation of a group listing of what preparations are needed. Having tested learners' prior knowledge, the tutor would then need to provide information on standard documentation such as notices of meetings, agendas, minutes etc, the format in which they should be presented, when they should be distributed and to whom. It may be useful to introduce a scenario at this stage to contextualise the documentation, and handouts, as example documentation to match the storyline, would enhance learner understanding.

Learning outcome 2 also needs to be delivered through a mix of group work and tutor input. Learners could work in small groups, each to discuss their ideas on one of the assessment criteria. Each group would then feed back, possibly using flipchart sheets that could be temporarily affixed to the wall, and the remainder of the group's ideas and tutor input added to each sheet during the group discussion.

For learning outcome 3, learners need to discuss the skills required to chair a meeting. The tutor will need to prepare scenarios of formal meetings that learners can role play in groups of five (dependent on class size but no fewer than four per group). Each member of the group would take on the role of chair, secretary, and attendee(s) for a period of 15 minutes and then, following a 10 minute session for review and verbal feedback from peers and tutor, move on to another role giving each group member the opportunity to experience all roles and to learn from the performance of others as the chair.

Learners will need to work individually to review the skills they used when chairing the meeting and identify areas for improvement for learning outcome 4.

Assessment

To achieve 1.1 and 1.2, learners must describe at least two different types of meeting. The description could include the purpose of the meeting and possible attendees. Learners should then outline the preparation required for one of those meetings. Where possible, learners could be encouraged to use a meeting that they are going to prepare for and attend. Referring to example handouts of a given scenario, learners could explain the requirements of and reasons for formal documentation in context.

Learners can achieve 2.1, 2.3 and 2.3 by explaining the role of the chair, secretary and attendee. This should include details on how the roles differ and the individual responsibilities. Wider discussion will help to add breadth to the roles, from which learners will be able to demonstrate their understanding of the roles, responsibilities and influences of various meeting attendees.

Learning outcome 3 could be assessed through the learner’s critical review of their performance as chair (also evidence for learning outcome 4), with both peer group and tutor assessment. For 3.1, feedback forms covering the key skills required to chair a meeting would need to be prepared for written tutor and peer group feedback to be given to each learner for 3.2.

The content of the completed forms would then inform the learner’s written review of the skills used when chairing the meeting. Assessment for 4.1 and 4.2 should be self-assessment activities, where learners reflect on their own performance and identify which skills may need improving and how this could be achieved.

Links to other BTEC units, other BTEC qualifications and other relevant units and qualifications

This unit forms part of the *WorkSkills from Edexcel* suite. This unit has particular links with:

Level 2 WorkSkills	Level 3 WorkSkills
Unit 9: Self-assessment	Unit 1: Career Development
Unit 12: Practising Leadership Skills with Others	Unit 3: Strategies to Improve Job Interview skills
Unit 18: Building Working Relationships with Colleagues	Unit 8: Personal Skills for Leadership
Unit 25: Contributing to Meetings	Unit 13: Giving and Receiving Feedback

Essential resources

There are no essential resources for this unit.

Indicative reading

ASTD Press — *10 Steps to Successful Meetings* (ASTD Press, 2009) ISBN 1562865471

Forsyth P – *The Meetings Pocketbook* (Management Pocketbooks, 2004) ISBN 9781903776278

Video Arts Communications video — *Going to a Meeting*

Websites

Chairing meetings www.union.ic.ac.uk/resource/skills/chair.html

How to Chair a Meeting — 5- minute video clip www.youtube.com

How to conduct effective meetings www.personneltoday.com/articles/2003/06/03/19133/how-to.-conduct-effective-meetings.html

Unit 8: Personal Skills for Leadership

Unit code:	A/503/2898
QCF Level 3:	BTEC Specialist
Credit value:	1
Guided learning hours:	10

Unit aim

The aim of this unit is to give learners knowledge and understanding of the skills needed to carry out a leadership role, together with the skills to plan the development of personal leadership skills.

Unit introduction

Skills in and experience of leadership are highly valued by employers and can be used to enhance many areas of an individual's personal life. Leadership skills are about improving communication within a group setting and influencing people to get things done. It is often the case that someone working at first level management is expected to lead a small team. In this unit learners will have the opportunity to develop these skills.

Learners will examine the many ways of being a leader and that most of the required skills can be learned with patience and persistence. Good leaders are trusted and able to motivate others, and being a leader benefits the individual by increasing their confidence.

In this unit learners will investigate the behaviours exhibited by leaders and leadership roles and styles in different situations. They will then conduct a self-examination of their own leadership skills.

On completion of this unit, learners will be able to practise and use peer assessment to help develop their leadership skills.

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 outcome	Assessment criteria
1 Understand personal skills required for leadership	1.1 Explain skills required for successful leadership 1.2 Review personal skills and the suitability for leadership
2 Understand different types of leadership and management	2.1 Explain the difference between leadership and management 2.2 Compare leadership styles in workplace situations
3 Be able to develop personal skills for leadership	3.1 Set objectives to plan development of personal skills for leadership 3.2 Prepare an action plan to develop personal skills for leadership 3.3 Review own performance against action plan to develop personal skills for leadership

Unit content

1 Understand personal skills required for leadership

Leadership skills: building working relationships; qualities eg enthusiasm, confidence, integrity, courage, leading by example; communication and listening skills eg active listening, questioning, body language; recognising and dealing with conflict situations; skills eg assigning work tasks, monitoring performance, motivating team members through inspirational and effective leadership, mentoring and coaching, giving and receiving feedback

Assessment of personal skills for leadership: self-assessment using tools eg personality tests; appraisal by employer/tutor, peer assessment

2 Understand different types of leadership and management

Difference between leadership and management: eg Adair's Action Centred Leadership model, difference between leadership eg envisioning, using empathy, showing courage, leading by example; and management eg maintaining status quo, avoiding difficult situations, firefighting.

Leadership styles: styles eg authoritarian, democratic, laissez-faire; adapting leadership style for different situations

3 Be able to develop personal skills for leadership

Planning to develop leadership skills: set objectives eg SMART targets, seek advice, use appraisal targets; research training opportunities eg training courses, distance learning, evening classes, internet/e-learning, mentor or coach; use hobbies/interests eg voluntary club/committee positions, sports, outdoor activities that provide a useful personal development challenge

Develop leadership skills: action eg carry out plan

Review: check skills developed against action plan and assess progress, include suggestions for development

Essential guidance for tutors

Delivery

Delivery of this unit should focus on helping learners to develop their leadership skills at a supervisory level and should include as many practical activities as possible to help learners relate the behaviours and models in the unit content to practical work situations. A wide range of techniques including presentations, seminars and guest speakers can support learning. Additional learning activities can include role play, simulations, learner presentations and group work.

To introduce the unit, and address learning outcome 1, learners should be encouraged to share their views on what they think makes a good leader. The tutor can give examples and the skills and qualities involved can be identified and recorded. Personal examples can be used such as being a captain of a sports team, helping run a group, being a class representative etc. A question and answer session could be used to establish which behaviours were exhibited. From this, learners can create a list of those skills, qualities and behaviours recommended for effective leadership, for example humility, compassion, integrity, humour, communication and inclusiveness.

Leadership roles in the workplace could be explored by considering different job descriptions and learners could complete a worksheet to identify the range of leadership roles. A guest speaker with a leadership role could be invited to speak about a team leader's role in keeping a team motivated. Leadership styles could be explored through different role-play situations, followed by a discussion establishing the features of different leadership styles. Learners could debate different leadership styles and when these are appropriate.

For learning outcome 2, tutors could provide examples of real-life or simulated activities involving a leadership role for learners to practise their skills. If learners are in work, they could select naturally occurring opportunities that would demonstrate a range of leadership skills. These opportunities may be identified with the help of a supervisor. Learners could develop a method of recording the leadership skills they demonstrated, such as a checklist or log, as a group activity. Peer assessment should be encouraged to help learners in their personal analysis. Feedback sheets could be created to help provide useful comments on how individuals perform in leadership roles.

Delivery to support learning about the difference between leadership and management could be supported by worksheets drawing on Adair's division of leadership and management skills, where learners could assess case studies and divide the skills into groups.

To introduce the concept of planning to develop personal skills for leadership, tutors could use a case study to explore the need to have clear objectives in a plan and use appraisal targets and training opportunities. Learners could consider how hobbies and interests can support the development of leadership skills. Learners could work individually to research, using the internet, a range of training opportunities to help them to develop their personal leadership skills.

Assessment

For 1.1, learners need to explain personal leadership skills demonstrated in a simulated activity or in the workplace. The simulation may be recorded on a video or supported by a witness statement from the tutor. A witness statement from a supervisor can be used if in the workplace.

For 1.2, learners need to consider the leadership skills they used in 1.1 and scrutinise how well they were used. Leadership skills that were not used also need to be identified.

For 2.1, learners should explain briefly the different behaviours that leaders and managers may demonstrate.

For 2.2, a minimum of two leadership styles need to be compared. This comparison needs to consider the effectiveness of the two styles in different workplace situations and a conclusion could be drawn about the effectiveness of the different styles.

To meet 3.1, learners need to set objectives for planning their personal skills development, ensuring these are SMART. For 3.2, they should produce a plan for developing their own personal leadership skills. Information could include timescales, examples of development programmes to be used and expectations of development. For 3.3 learners need to look back through their objectives and assess their level of achievement. This could be in the form of notes against each of their achievements.

Links to other BTEC units, other BTEC qualifications and other relevant units and qualifications

This unit forms part of the *WorkSkills from Edexcel* suite. This unit has particular links with:

Level 2 WorkSkills	Level 3 WorkSkills
Unit 11: Developing Personal Skills for Leadership	Unit 7: Organising and Chairing Meetings
Unit 12: Practising Leadership Skills with Others	Unit 9: Presentations for Work
Unit 18: Building Working Relationships with Colleagues	Unit 12: Negotiation Skills and Persuasion in the Workplace
	Unit 13: Giving and Receiving Feedback

Essential resources

There are no essential resources for this unit.

Indicative reading

Adair J — *How to Grow Leaders: The Seven Key Principles of Effective Leadership Development 2* (Kogan Page Ltd, 2009) ISBN 0749454806

Owen J — *The Leadership Skills Handbook: 50 Key Skills from 1000 Leaders* (Kogan Page Ltd, 2006) ISBN 074944827X

Websites

Leadership development tips	www.businessballs.com/leadership.htm
Leadership motivation assessment	www.mindtools.com/pages/article/newLDR_01.htm
Leadership styles	www.mindtools.com/pages/article/newLDR_84.htm
Slides introducing the Myers Briggs Type Indicator® theory	www.teamtechnology.co.uk/mb-intro/mb-intro.htm

Unit 9: Presentations for Work

Unit code:	F/503/2899
QCF Level 3:	BTEC Specialist
Credit value:	1
Guided learning hours:	10

Unit aim

The aim of this unit is to give learners the understanding and skills for planning, preparing and delivering a presentation in the work environment, and for reviewing the effectiveness of own performance for future improvement.

Unit introduction

Formal presentations, including the use of PowerPoint, are commonly used in the workplace as a cost effective and efficient form of communication, especially when more than one person has an interest in the subject matter. Job applicants may be asked to prepare a presentation for an interview and project managers may be asked to report on progress or evaluate the success of a project. In this unit learners will consider different situations in which a presentation might be used and why a presentation would be the best form of communication in that situation.

Learners will gain an understanding of how to research and extract key points for inclusion in a presentation, and how to structure their content to suit the situation and audience. Throughout the unit learners will develop a sense of audience and explore how to pitch a presentation to meet their needs.

This unit will give learners the opportunity to plan, prepare and deliver a presentation. In addition to subject knowledge and delivery skills, focus and timing are essential in a working environment and learners will consider different preparation methods to ensure the time allocated for a presentation is used to maximum effect.

Learners will plan and prepare material and visual aids for a specific circumstance and audience, practise their delivery skills and reflect on their performance.

On completion of the unit, learners will be able to describe and demonstrate the various factors that combine to make an effective presentation and identify areas for personal development.

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 the purpose of presentations in the workplace	1.1 Explain types of presentation which can be used in workplace situations 1.2 Compare the advantages and disadvantages of using presentations as a method of communication
2 Be able to present to a specific audience	2.1 Plan a presentation that meets a specific audience need 2.2 Prepare a presentation for a specific audience 2.3 Deliver a presentation which meets audience needs
3 Be able to review own performance	3.1 Conduct an analysis of skills used during own presentation 3.2 Produce a plan for improvement of presentation skills

Unit content

1 Understand the purpose of presentations in the workplace

Situations for presentations: types eg interview, sales pitches, explaining information; meeting eg formal, informal

Types of presentations: types eg PowerPoint, spoken or written report, papers at meetings, conference calls, video

Advantages: reasons eg clarity of message, reaching a wider audience, opportunity for open debate, convey personal knowledge, opportunity to persuade, display presentation skills, discuss own views

Disadvantages: reasons eg poor speaker, unclear message, PowerPoint over used, too much dependency on handouts, does not engage audience, switches people off

2 Be able to present to a specific audience

Plan: techniques eg research subject, research audience, identify key issues, outline structure, notes, prompt cards, visual aids

Preparation: techniques eg rehearse content, language, structure; visual impact eg body language, gestures, eye contact, clothes, visual aids; vocal impact eg tone, volume, pace, exercises to combat nervousness

Delivery: aspects eg timing, prompt cards, visual aids

3 Be able to review own performance

Analyse skills used: aspects eg planning and preparation, delivery, confidence, handling nerves, dealing with questions, keeping to time

Plan improvements: options eg observation of others, further practice, training, identify appropriate courses

Essential guidance for tutors

Delivery

During delivery of this unit learners should be given as many opportunities as possible to discuss and compare their ideas and thoughts on presentations they have observed to inform their own delivery and style. Practical experience and constructive feedback are also essential to the successful completion of this unit.

It would be useful for learners to approach the unit, and learning outcome 1 specifically, by sharing and discussing their experiences of presentations, as part of an audience or as deliverer, in order to establish their knowledge of different types of presentations and when they are used.

Small groups could develop this by sharing their ideas on the pros and cons of using presentations as a form of communication and what actually makes an effective presentation. They should be encouraged to think about presentations they have seen and what made them good or not so good. It may be helpful for them to think about stand-up comedians, music acts or TV programmes (for example news presenters, chat shows) to identify why they consider them to be effective. Discussions could then explore the different uses of presentations in the workplace.

Tutors need to consolidate the outcomes of these discussions and use the findings as examples when delivering the theory that supports planning, preparation and delivery of presentations.

Learning outcome 2 requires learners to plan, prepare and deliver a presentation and the tutor will need to explain how to structure and plan a presentation that demonstrates a knowledge of the audience and their needs whilst conveying key messages. The planning stage could be interactive by choosing one of the selected personalities or celebrities from the previous activity, identifying effective presentations given by that person and then unpicking the performance in terms of both visual and verbal impact. Learners could speculate on how the celebrity researched their audience and planned their notes and visuals accordingly, with the tutor building on ideas to ensure learners are aware of a range of methods of preparation.

As well as understanding the impact of lack of preparation on delivery, learners should also think about how to deal with common problems that arise through nervousness. The tutor will need to provide guidance on how to overcome these through breathing techniques, focusing on content, looking slightly above heads, having back up for PowerPoint etc. Learners could then be given a specific subject, for example a job, holiday, volunteer work they have done or are doing, and plan a presentation for a specific audience, possibly as part of a work placement interview. This should be about 10 minutes long. The tutor could invite guests to observe learner presentations (possibly from companies involved in the workplacement scheme) as well as the learner's peer group. Presentations could be recorded to help individual learners review their own performance and identify what went well and where improvements could be made to meet the requirements of learning outcome.

Assessment

To achieve 1.1, learners need to review the notes taken during their initial group discussions and produce evidence that demonstrates their understanding of the purpose of presentations in the workplace by describing the different types of presentation they have identified and exploring the situations in which they could be used. By explaining the group exercise and using their own examples learners can compare the advantages and disadvantages of using presentations as a method of communication, to achieve 1.2.

Learners need to produce a plan for 2.1 with evidence of preparation for 2.2. Tutor, guest and peer group observation forms can be used as evidence for 2.3. Forms covering the key elements of the presentation would need to be produced for the audience to complete after each presentation.

Using tutor, guest and peer group assessments, and a video or DVD of their presentation if available, learners will be able to review their own performance and identify areas for improvement in a written document, together with producing a plan of how these could be improved, to meet 3.1 and 3.2.

Links to other BTEC units, other BTEC qualifications and other relevant units and qualifications

This unit forms part of the *WorkSkills from Edexcel* suite. This unit has particular links with:

Level 2 WorkSkills	Level 3 WorkSkills
Unit 7: Interview Skills	Unit 2: Maximising Potential when Applying for a Job
Unit 9: Self-assessment	Unit 8: Personal Skills for Leadership
Unit 14: Communicating Solutions to Others	Unit 13: Giving and Receiving Feedback
Unit 26: Preparing for Work Placement	Unit 18: Project Management Skills

Essential resources

Video/DVD recording equipment would be useful.

Indicative reading

Jay R — *Effective Presentation: How to Create and Deliver a Winning Presentation 3rd Ed* (Prentice Hall, 2004) ISBN 0273688030

Townsend J – *Presentations Pocketbook* (Management Pocketbooks, 2009) ISBN 1906610150

Weissman J, Kaszubski W and NetLibrary Inc — *Absolute Beginner's Guide to Winning Presentations* (Que Pub, 2004) ISBN 0789731215

Website

Presentation tips for public speaking www.aresearchguide.com/3tips.html

Unit 10: Planning for Professional Development

Unit code:	K/503/2900
QCF Level 3:	BTEC Specialist
Credit value:	2
Guided learning hours:	15

Unit aim

The aim of this unit is to give learners the knowledge, understanding and skills to plan to meet the improvements identified through self- assessment of their professional development needs.

Unit introduction

A core management system for many organisations is performance review which sits within a professional development process. This process enables individuals to acquire and develop skills, competences and knowledge relevant to the changing demands of the organisation and the individual's current and future roles within it. Professional development builds on an individual's capacity to contribute to the organisation's strategic and operational plans and objectives, and encourages individual development and improved personal effectiveness and satisfaction.

In this unit learners will have the opportunity to explore the skills and knowledge required for professional development, before identifying their own strengths and development needs. This will enable them to examine their own professional development needs, and research how to meet them to inform the structure of a professional development plan.

On completion of this unit, learners will review their own performance and development needs and understand how to access methods to maintain and improve their personal and professional competency and enhance their career progression.

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 Know how to identify strengths and needs for own role	1.1 Describe skills, qualities and experience which are needed in own role 1.2 Use tools and techniques to identify own strengths and needs for own role
2 Understand opportunities for professional development	2.1 Explain own professional development needs 2.2 Assess opportunities available for professional development
3 Be able to plan own professional development	3.1 Prepare a professional development plan 3.2 Record professional development achievements against planned goals 3.3 Assess professional development achievements against planned goals

Unit content

1 Know how to identify strengths and needs for own role

Skills, qualities and experience: skills eg IT, using machinery, driving, in addition to specific job skills; qualities eg positive self-image, attitude, ability to adapt to change, motivation, flexibility, desire to learn, aptitudes; experience eg previous work, voluntary work, qualifications, travel

Tools and techniques to identify strengths and needs: types eg 360 degree feedback, SWOT analysis, self-analysis, compare with previous development plan, match to job description, person specification for job

2 Understand opportunities for professional development

Professional development: identify needs eg proofreading, project management, time management, stress management, skills development; identify steps to meet needs and build on strengths

Opportunities for development: professional development matches company goals eg in-house training programmes, learning zones within organisations, induction, mentoring, coaching, volunteering schemes, shadowing, secondment; external courses eg accredited qualifications, residentials, skills development, study programmes

3 Be able to plan own professional development

Professional development plan: objectives eg reflect organisation's needs, meet own needs, reflect identified needs for job role, are achievable, time constrained, realistic; agreed with line manager or tutor

Record: achievements against goals over a period of time

Assess: achievements against goals, noting successes, explaining if goals are not achieved, suggesting further requirements

Essential guidance for tutors

Delivery

Delivery of this unit should focus on helping learners to evaluate performance in their own work or study role in order to plan their professional development effectively. Learners will need to focus on their skills, competences and knowledge in relation to their current and future roles within the organisation. A mixture of tutor-led input and individual learner reflection is required.

To introduce the unit, learners could thought shower the qualities and skills that employers look for in an employee to invest in their professional development.

An employer could be invited to talk about the professional development programme in their organisation and the required preparation. Learners could prepare questions about the benefits to the organisation of supporting the professional development of their employees. Learners could discuss the benefits to the individual of continuing professional development, considering how a current role may be enhanced by improving job or study satisfaction and increasing opportunities for progression within the organisation. Tutors could introduce the concept of lifelong learning.

The need to complete a personal audit of skills, qualities and experience, before starting to plan for professional development, could be explored through discussion. The importance of ensuring self-assessment focuses on the job role and person specification for the job or course should be emphasised by the tutor. Learners could research different self-assessment tools using internet sources and present their findings to the group. They could discuss the advantages and disadvantages of the different tools. Learners at this level should be able to identify their own strengths and needs in relation to their work role autonomously.

For learning outcome 2, learners could work in small groups to investigate the professional development opportunities different organisations provide by examining organisation statements. Learners could work in groups to analyse case studies of individuals to consider how they could benefit from different professional development opportunities. This will help learners to understand how the individual may enhance their skills through these different opportunities. Learners need to work independently to consider their own opportunities for professional development in relation to their identified needs, their work role, the organisation's goals, opportunities provided by the organisation and external courses.

Learners could analyse examples of personal development plans to consider different ways to present plans. Learners could work in groups to compile a format for a professional development plan to include an audit, targets and an action plan. Learners could discuss the need for plans to be SMART (specific, measurable, achievable, realistic and time-bound) and agreed by the line manager or tutor.

Assessment

Evidence for all assessment criteria could be provided in a professional development plan using a standard template.

For 1.1, learners need to describe the skills, qualities and experience required in their work role. They can refer to the job description or learner profile.

For 1.2, learners need to give details of their strengths that match the requirements of their work role. Learners will need to provide evidence of using at least two self-analysis tools or techniques, for example a SWOT analysis referenced to the job or course description. They must give brief details of at least two skills and two qualities they need to develop for their own role.

For 2.1, learners must focus on their own needs and strengths (identified in 1.2) and their role to explain their professional development needs. Information about specific opportunities available in their organisation, and external courses and experiences available, must be included in the plan.

For 2.2, learners must assess at least two different opportunities that may be available to develop the skills, qualities and experience needed to support professional development. Learners need to assess the suitability of opportunities both within an organisation and externally.

For 3.1, learners need to set targets and an action plan for their professional development. The targets need to be relevant to the strengths and needs identified in 1.2, appropriate to their own role and the aim of the organisation, and be SMART (specific, measurable, achievable, realistic and time-bound).

For 3.2 and 3.3, learners should record and assess their achievements. They should note successes but also where they have not achieved, suggesting areas for improvement.

Links to other BTEC units, other BTEC qualifications and other relevant units and qualifications

This unit forms part of the *WorkSkills from Edexcel* suite. This unit has particular links with:

Level 2 WorkSkills	Level 3 WorkSkills
Unit 8: Self-management Skills	Unit 1: Career Development
Unit 9: Self-assessment	Unit 11: Reviewing Professional Development
Unit 22: Setting and Meeting Targets at Work	Unit 17: Managing a Work-life Balance

Essential resources

Learners need to have had experience of work. This may be a work placement, employment or voluntary work.

Indicative reading

Hong C and Harrison D — *Tools for Continuing Professional Development* (Quay Books, 2003) ISBN 185642250X

Megginson D — *Continuing Professional Development, 2nd edition* (Chartered Institute of Personnel and Development, 2007) ISBN 1843981661

Websites

The Chartered Institute of Personnel and Development — examples and templates

www.cipd.co.uk/cpd/guidance

Slides introducing the Myers Briggs Type Indicator® theory

www.teamtechnology.co.uk/mb-intro/mb-intro.htm

SMART targets

www.projectsart.co.uk/use-smart-objectives-to-focus-goals-plans-and-performance.html

SWOT analysis method and template

www.businessballs.com/swotanalysisfreetemplate.htm

Unit 11: Reviewing Professional Development

Unit code:	M/503/2901
QCF Level 3:	BTEC Specialist
Credit value:	1
Guided learning hours:	10

Unit aim

The aim of this unit is to give learners the knowledge, understanding and skills needed to use a professional development plan to review own learning and development and then be able to set new targets to meet identified needs.

Unit introduction

A core management system within many organisations is performance review, which forms part of a professional development process. This process encourages individuals to acquire and develop skills, competences and knowledge relevant to the changing demands of the organisation and the individual's current and future role within it. Professional development builds on the individual's capacity to contribute to the organisation's strategic and operational plans and objectives, and encourages individual development and improved personal effectiveness and satisfaction.

This unit represents the second stage of the process where learners are required to review their learning and development over a set period of time, see if targets have been met and decide how to move forward, setting new targets in the light of previous achievement and work-related needs. If learners are not in work it is possible to use the same systems and processes for development in a learning environment, for example through a tutorial programme in school or college.

In this unit learners need to revisit their professional development records and review their progress against the targets set. Learners will need to start thinking about their further professional development needs and how to meet them. The final part of the unit requires learners to agree actions for further professional development.

On completion of this unit, learners will have completed a learning and development cycle, having conducted a review of their own performance and development needs and reviewed their progress in meeting those needs. It is hoped that learners will understand how to access ways to maintain and improve their personal and professional competency and enhance their career progression.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that learners present for assessment needs to demonstrate that they can meet all of the learning outcomes for the unit. The assessment criteria describe the level of achievement required to meet the learning outcomes.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
1 Know how to review own professional development	1.1 Describe learning and development achievements 1.2 Identify the evidence for these achievements
2 Understand how to assess own professional development	2.1 Review professional development progress against own professional development plan 2.2 Assess how own professional development has affected own role
3 Be able to plan own further professional development	3.1 Describe content of professional development plan not yet achieved 3.2 Plan additional professional development for the workplace 3.3 Agree ongoing actions for further professional development

Unit content

1 Know how to review own professional development

Identify achievements: skills developed eg IT, mechanical, editing, nursing, first aid, driving, as identified in plan; courses attended eg internal, external, formal, informal, online learning, dates, venues; company schemes eg work experience, job shadowing, volunteering; qualifications achieved

Evidence achievements: certificates for formal qualifications eg short course, degree, MA, technical; attendance certificate for training eg internal courses, in-house eg customer care, induction, witness statements

2 Understand how to assess own professional development

Progress against plan: how much of planned activity achieved eg skills developed, courses attended, online learning, qualifications taken, as described in plan

Effectiveness for role: improved efficiency eg through developed skills, relevant knowledge, greater understanding, new techniques to aid role; discuss level of improvement with manager or tutor

3 Be able to plan own further professional development

Revise professional development plan: review eg have targets been met, what is outstanding

Plan and agree professional development: assess previous objectives, set objectives eg reflect organisation's objectives, meet own needs, reflect identified needs, ensure objectives are achievable, time constrained, realistic; agree with line manager; identify needs eg proofreading, project management, time management, stress management, shadowing, secondment, study skills; identify steps to take to meet needs and build on strengths

Essential guidance for tutors

Delivery

For this unit, learners need to have been involved in the implementation of a professional development plan. Learners will be expected to have gathered evidence of their progress against previously set targets.

For much of this unit, learners will need to focus on reviewing their own professional development and setting further targets for their future role within the organisation. A mixture of tutor-led input and individual learner reflection is therefore required. Learners could carry this out either in the workplace or in a learning environment.

To introduce the unit, a training manager or learning and development manager could be invited to talk about the value of continuing professional development to an organisation. Learners could 'thought shower' the skills and experiences that can be developed through professional development activities.

Learners could discuss the range of formal and informal ways professional development may be supported and how achievements can be shown. They could work in groups to analyse case studies to identify the benefits of continuing professional development to the career progression of individuals. Learners could be encouraged to share their experiences of different professional development opportunities to consider how they benefited from the experiences.

Learners need to work independently to consider their own learning and development and collate the supporting evidence.

For learning outcome 2, learners could discuss the importance of ensuring professional development is relevant to their work/study role. Learners could work in pairs to compare their professional development plans and consider the relevance of their professional development achievements to their work roles. Alternatively, they could work independently to review their own development plan to identify set targets which were not achieved and identify what is left to do. Learners at this level should be able to evaluate the effectiveness of their professional development autonomously.

Setting new targets for professional development for learning outcome 3 could be explored through a question and answer session to remind learners of the process they used to set their original targets. The importance of setting targets which reflect their identified needs, their work role, the organisation's goals and are SMART (specific, measurable, achievable, realistic and time-bound) needs to be emphasised. The need for plans to be agreed with the line manager could be discussed by learners.

Assessment

Evidence for all assessment criteria could be included in a professional development plan (PDP) or individual learning plan in an educational environment.

For 1.1, learners need to refer to the targets in their initial professional development plan and describe formal and/or informal learning and skills and/or experiences they have developed.

For 1.2, learners need to identify evidence for all the learning and development given in 1.1. This may include qualification certificates, attendance certificates or witness statements.

For 2.1, learners need to reflect on their professional development with reference to the targets in their professional development plan. This must include what has been achieved and what is still left to do.

For 2.2, learners need to assess the value of their learning and development so far and how they have enhanced their effectiveness in their job role. Both positive and negative aspects must be considered.

For 3.1, learners need to describe any areas not yet achieved in the PDP, moving on to set new targets and an action plan to advance their professional development for 3.2. This requires learners to reappraise their skills against the requirements of the job role, consider targets which were not met in their initial plan and organisational aims. Action plans must be SMART (specific, measurable, achievable, realistic and time-bound).

For 3.3, learners need to provide evidence that the action plan in 3.1 has been agreed with their line manager or tutor.

Links to other BTEC units, other BTEC qualifications and other relevant units and qualifications

This unit forms part of the *WorkSkills from Edexcel* suite. This unit has particular links with:

Level 2 WorkSkills	Level 3 WorkSkills
Unit 8: Self-management Skills	Unit 1: Career Development
Unit 15: Effectiveness at Work	Unit 10: Planning for Professional Development
Unit 22: Setting and Meeting Targets at Work	Unit 17: Managing a Work-life Balance
Unit 23: Solving Work-related Problems	Unit 19: Skills for a Portfolio Career

Essential resources

Learners need to have had experience of work through a work placement, employment or voluntary work, and they need to have implemented a professional development plan.

Indicative reading

Hong C and Harrison D — *Tools for Continuing Professional Development* (Quay Books, 2003)

Megginson D — *Continuing Professional Development, 2nd edition* (Chartered Institute of Personnel and Development, 2007)

Website

The Chartered Institute of Personnel and Development www.cipd.co.uk/cpd/guidance

Unit 12: Negotiation Skills and Persuasion in the Workplace

Unit code:	T/503/2902
QCF Level 3:	BTEC Specialist
Credit value:	2
Guided learning hours:	15

Unit aim

The aim of this unit is to give learners the knowledge and skills needed to develop and apply persuasion and negotiation techniques in workplace situations, and review these skills for future improvement.

Unit introduction

The skills which enable us to negotiate using persuasion can be applied to aspects of both our personal and professional life. These skills include being able to communicate verbally and non-verbally, showing flexibility and resolving conflict. In this unit learners will have the opportunity to develop and demonstrate skills in these key areas.

Learners will explore persuasion skills and situations in the workplace where persuasive techniques may be used. They will examine the negotiation skills and techniques required for a range of situations which may arise in the workplace, including conflict resolution.

On completion of the unit, learners will be able to apply their knowledge of persuasion and negotiating skills and techniques to a practical situation, review the skills they used and recommend how they can develop their skills.

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 Know about persuasion in the workplace	1.1 Describe situations in the workplace where persuasion is used 1.2 Outline skills used to persuade others
2 Be able to use skills to negotiate	2.1 Explain ways to use negotiation in the workplace 2.2 Demonstrate the skills required to negotiate
3 Be able to review own skills in negotiating	3.1 Evaluate own skills used in negotiating 3.2 Identify areas for improvement of own skills

Unit content

1 Know about persuasion in the workplace

Persuasion: behaviours eg convincing, influencing, reducing resistance to new ideas, getting people to do what you want them to do

Situations where persuasion is used: types eg sell a product, get others to accept new procedures, get others to accept a new approach, take on a new role with new responsibilities, change working patterns, carry out more work with fewer resources, take on a new challenge

Skills: range eg establishing trust, arguing, reasoning, motivating, encouraging, empathy, handling objections and resistance

2 Be able to use skills to negotiate

Negotiation: behaviours eg compromise to settle an issue or argument, give and take to reach fair consensus, resolution of situations where what you want conflicts with what someone else wants, both sides feel positive about the result, creating a win/win situation

In the workplace: situations eg contracts, pay rise, appraisal targets, work rota, allocation of responsibilities in a team, pricing for a service or product

Skills: verbal communication eg tone, listening; non-verbal communication eg eye contact, gestures, proximity, posture, facial expression, awareness of non-verbal communication of others; flexibility; resolving conflict

Negotiation techniques: behaviours eg set out objectives, know your limits, know what the other party is trying to achieve, discuss incentives/rewards for the other party, see points of view of other party, manage conflict, close the deal

3 Be able to review own skills in negotiating

Evaluation of negotiation skills: consider eg effectiveness of skills in achieving win/win result, how successful communication skills were used in reaching consensus, how demonstrating flexibility helped to achieve fair result, use of conflict resolution to settle the issue

Areas for improvement: types eg research into non-verbal communication eg NLP, further training in conflict resolution; identify areas to improve in response to feedback

Essential guidance for tutors

Delivery

This unit has been designed to make the key topics as practical as possible to help learners understand how to develop their skills and apply them to the workplace. Drawing on real-life situations through the use of demonstrations, role play, guest speakers and extracts from television programmes or films will help learners to relate the unit content to the workplace.

To introduce the unit, learners could consider situations they have been involved in where negotiation and persuasion skills have been used. Discussion could include the success of different techniques and defining the difference between persuasion and negotiation.

For learning outcome 1, learners could explore demonstrations of selling techniques used in advertising and videos of television programmes such as *Dragons' Den*. They can analyse persuasion skills used by successful individuals. Learners could go on to consider how these skills apply to other situations where persuasion is required. A guest speaker from a charity could speak to learners about techniques used to persuade people to donate and volunteer.

Learning outcome 2 could be delivered through role play of situations learners are familiar with, such as negotiating for an extension for assignment completion or for a price reduction on a purchase, to help them appreciate the techniques used for successful negotiation, such as having clear objectives, knowing your limits and appreciating the point of view of the other party. Role play also gives learners the opportunity to practise their negotiation skills, such as communication, flexibility and conflict resolution, which will help them prepare for learning outcome 3.

In a group discussion, learners could identify situations in the workplace where negotiation may be required and should be encouraged to consider their own experiences in the workplace. Analysing workplace negotiation scenarios in small groups, followed by a discussion about the application of negotiation techniques and skills to different workplace situations and their effectiveness in achieving a win/win result, will help prepare learners for the self-evaluation required in learning outcome 3.

Learners could select a workplace scenario to demonstrate their negotiation skills which could be provided by the tutor or devised by learners. Learners need to consider the particular negotiation techniques required in the scenario, for example the incentives for the other party, their own limits. Learners could demonstrate their negotiation skills to another learner which may be recorded or observed by the tutor. Peer assessment of the effectiveness of negotiation skills will help learners to self-evaluate objectively.

For learning outcome 3, learners could work in groups to devise a format to evaluate their negotiation skills. This may be in the form of questions, for example was a win/win result achieved? how successful were non-verbal communication skills? how well was flexibility demonstrated? Learners could carry out individual internet research into how to develop identified areas for improvement.

Assessment

The information required for 1.1 and 1.2 may be combined into one assignment task and evidenced in a variety of ways. For example, learners may gather the information and present it to the group or they may prepare a factsheet. For 1.1, learners need to describe at least two different workplace situations where persuasion is used.

For 1.2, learners must demonstrate their understanding of at least two different skills required to persuade others. Examples of how the skills can be used in the workplace situations described in 1.1 will support their explanation.

For 2.1, learners must explain in detail how to negotiate in at least two different workplace situations. They must explore at least two negotiation techniques and try to ensure successful resolution for both parties.

For 2.2, learners need to demonstrate verbal and non-verbal communication skills, flexibility and resolution of conflict in a negotiation situation. This may be achieved in a role-play situation. The situation may be devised by the learner or chosen from a selection produced by the tutor and may be a one-to-one or group situation. Evidence may be videoed or be a witness statement from the tutor.

For 3.1, learners need to consider the effectiveness of the negotiating skills used in 2.1. The evaluation must include a consideration of how successfully verbal and non-verbal communication skills, flexibility and resolution of conflict were used in the negotiation situation.

For 3.2, learners need to identify at least two aspects of their negotiating skills that could be developed.

Links to other BTEC units, other BTEC qualifications and other relevant units and qualifications

This unit forms part of the *WorkSkills from Edexcel* suite. This unit has particular links with:

Level 2 WorkSkills	Level 3 WorkSkills
Unit 8: Self-management Skills	Unit 8: Personal Skills for Leadership
Unit 11: Developing Personal Skills for Leadership	Unit 13: Giving and Receiving Feedback

Essential resources

There are no essential resources for this unit.

Indicative reading

Borg J — *Persuasion: The Art of Influencing People, 3rd edition* (Prentice Hall, 2010) ISBN 0273734164

Goldstein N, Martin S and Cialdini R — *Yes! 50 Scientifically Proven Ways to be Persuasive* (Free Press, 2009) ISBN 1416576142

Peeling N — *Brilliant Negotiations: What the Best Negotiators Know, Do and Say and Do* (Prentice Hall, 2011) ISBN 0273743244

Pirie M — *How to Win Every Argument: The Use and Abuse of Logic* (Continuum International Publishing Group Ltd, 2007) ISBN 0826498949

Websites

Edinburgh Business School — negotiation styles quiz www.ebsglobal.net/programmes/negotiation-quiz

Sales and selling — training and techniques www.businessballs.com/salestraining.htm

Unit 13: Giving and Receiving Feedback

Unit code:	A/503/2903
QCF Level 3:	BTEC Specialist
Credit value:	2
Guided learning hours:	15

Unit aim

The aim of this unit is to give learners the knowledge and skills required to give and receive feedback in workplace situations, and identify areas for improvement.

Unit introduction

Giving and receiving feedback is an important part of the communication process within the workplace. People are the most important resource for any business and honest, constructive feedback enables them to clarify tasks and issues, avoiding misunderstandings and ensuring a healthy and productive working environment.

Feedback enables people to learn and progress personally and professionally.

In this unit learners will explore situations in which feedback could be given, and by whom, both at work and in less formal circumstances. They will develop their knowledge and understanding of why we sometimes avoid feedback and the benefits it can bring to all parties when given. Not all feedback is positive and constructive, it can be negative and destructive. This unit will enable learners to develop skills in and knowledge of giving and receiving feedback in a range of situations.

Learners will examine established methods of giving feedback and have the opportunity to develop essential skills to give and respond to feedback. Learners will practise these skills and apply them in a given situation.

Learners will explore the benefits of receiving feedback, and why people sometimes avoid this, and examine the techniques and skills needed. Learners will have the opportunity to practise and develop skills in practical situations and to review and work out plans for improvement.

The knowledge and skills gained in this unit underpin other WorkSkills units and are essential to written and verbal communication, self-assessment and personal development. On completion of this unit, learners will be able to identify areas for personal development in relation to giving and receiving feedback and plan for future situations.

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 the purpose of constructive feedback in the workplace	1.1 Describe the types of situation where feedback may be given 1.2 Describe the purpose of constructive feedback in the workplace 1.3 Identify reasons for avoiding giving and receiving feedback 1.4 Outline the benefits of constructive feedback
2 Be able to give and receive constructive feedback	2.1 Explain techniques and skills required for giving and receiving constructive feedback in workplace situations 2.2 Demonstrate skills required to give and receive constructive feedback
3 Be able to review own skills in giving and receiving constructive feedback	3.1 Review own skills in giving and receiving constructive feedback 3.2 Recommend improvements to own skills when giving and receiving constructive feedback

Unit content

1 Understand the purpose of constructive feedback in the workplace

Feedback situations: formal eg performance review, team debriefing, target assessment, interview; informal, 360 feedback eg social behaviour, customer service, friends' actions or comments

Purpose: confidence building, performance improvement, identify strengths and weaknesses, correction, achievement

Avoidance: reasons eg fear of conflict, being disliked, lack of confidence

Benefits: provides win-win outcomes, learning and development, increases self-awareness, know how others view behaviour or performance, creates an open and productive working environment, opportunity to ask for help

2 Be able to give and receive constructive feedback

Techniques: types eg sandwich, constructive criticism, BIFF ie Behaviour, Impact of behaviour, own/others Feelings, Future behaviour

Skills for giving feedback: planning eg where, when and why, timing, listening, asking open questions, reflecting back, negotiation; awareness of receiver's needs; giving positive and negative feedback; awareness of legal issues regarding discrimination, on grounds of sex, race, disability, sexual orientation, religion

Skills for receiving feedback: behaviours eg open minded, willing to learn, listening, clarifying, questioning

3 Be able to review own skills in giving and receiving constructive feedback

Analyse skills: effectiveness eg in giving feedback, receiving feedback, identify areas of difficulty

Areas for improvement: list improvements needed eg skills for giving feedback, skills for receiving feedback; identify help required eg observing others, training

Essential guidance for tutors

Delivery

This unit lends itself to the 'learn, practise, assess' model of delivery. The theory of giving feedback can be taught in a structured way, practise is essential for learners to be able to deliver constructive criticism and to receive feedback in a positive manner. Learners should have the opportunity to consider all situations where they have experienced receiving feedback, both positive and negative, the manner in which the feedback was given and how it made them feel. This will help them to understand the benefits of using a set format when giving feedback and how, in turn, this makes feedback easier to receive and respond to.

To introduce the unit it would be useful for learners to thought shower their experiences of feedback in a variety of situations for example at college or school, socially, at work. They could expand these discussions by thinking about specific situations, for example where they would like to have given feedback but did not and the reasons why. There are a number of short video clips on YouTube that could help to engage learners and broaden their knowledge of the range of situations in which feedback is given.

Tutors need to explain how constructive feedback can be beneficial even if the feedback relates to a negative situation. Again, there are short clips on YouTube, delivered by professionals in the behavioural field that learners could view and discuss. It is important that tutors capture ideas and suggestions which relate to the assessment criteria on a board or flipchart for learners to use when producing their evidence.

Learning outcome 2 could be delivered initially by tutors describing feedback models and relating them to situations where they would be most useful, for example using the BIFF model to tackle someone who constantly talks in class or an employee who is frequently late to meetings, or the sandwich model when feeding back on an assignment that has good points but also some areas for improvement or to an employee who has completed a project well and to time but missed some detail.

Working to a given scenario, learners should have the opportunity to practise using the model they consider the most appropriate to the situation in small groups. This could be followed by a broader discussion where the whole group could unpick the skills that they felt were needed during the small-group activity, with the tutor contributing as necessary. Each learner should record a list of the skills necessary to give and receive effective feedback.

Learners need to apply the skills they have developed through role playing set scenarios. This could be in groups of three with each member of the group taking on the role of giver, receiver and observer in rotation. For this activity the tutor would need to prepare three different scenarios to keep learners engaged and allow all learners to develop their own ideas. Roles should rotate every 30 minutes allowing 20 minutes for role play and 10 minutes for the observer's feedback. The tutor would need to circulate and observe. Each member of the group will have the opportunity to observe and feed back and a simple form should be drawn up to enable learners to comment on key skills used and areas for improvement. Feedback should be given to each participant and learners need to record this for assessment.

A plenary session could then identify general themes in terms of what went well and what could be improved. Notes from this, plus the completed observer's sheet and tutor observation forms, would form the basis for learners' evaluation of their own feedback skills for learning outcome 3.

Assessment

Learners could produce a short guide to giving and receiving feedback, in which they cover the various assessment criteria in a structured and informative way.

For 1.1, 1.2, 1.3 and 1.4, learners could describe the purpose of 'feedback' and identify reasons why people avoid giving and receiving feedback. This should also include an outline of the benefits of constructive feedback. Learners could evidence their understanding of the benefits of constructive feedback for 1.4, by linking this to a situation they would like to have changed and showing how it could have been improved.

For 2.1, learners can describe a feedback situation, using the set scenario, giving reasons for the model chosen. By explaining what went well and not so well, learners will demonstrate that they know how to give feedback.

A video recording of the learner could be used as evidence of them demonstrating skills needed to give and receive feedback. 2.2 could also be evidenced through completed peer group and tutor observation forms.

Assessment criteria 2.2, 3.1 and 3.2 could be evidenced through a combined task. Learners could demonstrate their skills in giving and receiving feedback in a role-play situation. They could then review the skills they demonstrated and recommend how to improve their skills in both giving and receiving feedback.

Links to other BTEC units, other BTEC qualifications and other relevant units and qualifications

This unit forms part of the *WorkSkills from Edexcel* suite. This unit has particular links with:

Level 2 WorkSkills	Level 3 WorkSkills
Unit 12: Practising Leadership Skills with Others	Unit 8: Personal Skills for Leadership
Unit 17: Learning from More Experienced People	Unit 14: Coaching skills for the Workplace
Unit 14: Communicating Solutions to Others	Unit 15: Mentoring Skills for the Workplace
Unit 18: Building Working Relationships with Colleagues	Unit 10: Planning for Professional Development
	Unit 18: Project Management Skills

Essential resources

There are no essential resources for this unit.

Indicative reading

Hathaway P — *Giving and Receiving Feedback (50 minute Series)* (Crisp Publications Inc, 1997) ISBN 1560524308

Websites

Management library <http://managementhelp.org/commskls/feedback/feedback.htm>

Information and activities on giving and receiving feedback www.businessballs.com

Business and careers reference guide <http://www.dummies.com/how-to/content/giving-constructive-feedback.html>

Unit 14: Coaching Skills for the Workplace

Unit code:	F/503/2904
QCF Level 3:	BTEC Specialist
Credit value:	2
Guided learning hours:	15

Unit aim

The aim of this unit is to give learners knowledge and understanding of the benefits of coaching team members, and to enable them to develop and apply their skills in coaching situations.

Unit introduction

Coaching is becoming an increasingly popular method in the workplace of assisting staff with issues such as project management, improving performance, promotion, achieving a work-life balance, conflict resolution and dealing with organisational change.

This unit is an introduction to coaching and learners will develop an understanding of the benefits and how to use coaching skills in the workplace. Learners will have the opportunity to investigate the models and skills used when coaching team members, and apply this knowledge to case studies or role-play situations.

Learners will explore the purpose of coaching, the benefits it provides to the coachee, coach and stakeholders such as employers and the characteristics and skills needed to be an effective coach. Learners will examine coaching skills, such as active listening and using questioning, and learn how to apply them in workplace situations.

On completion of the unit, learners will be able to practise using coaching skills and, through the process of review and improvement, they will be able to develop their understanding and application of coaching.

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 Know the value of coaching to the coach, coachee and stakeholder	1.1 Define the purpose of coaching 1.2 Describe the benefits of coaching to the coach, coachee and stakeholder
2 Understand the characteristics and skills of a coach and coachee	2.1 Explain the characteristics and skills of a coach 2.2 Explain the characteristics and skills of a coachee
3 Be able to use coaching skills	3.1 Demonstrate coaching skills within a structured coaching format 3.2 Review own coaching performance drawing on different viewpoints

Unit content

1 Know the value of coaching to the coach, coachee and stakeholder

Purpose of coaching: definition eg a client-centred process that is solution focused and result orientated to help individuals improve their performance

Benefits to coach: personal eg provides personal satisfaction of helping others, expands awareness of human nature and common issues facing clients; professional eg may be fee earning, extra work role

Benefits to coachee: for individual eg encourages self-awareness of values and desires; professional eg maximises potential, increases motivation, develops focus, self-discipline and time management

Benefits to stakeholder: for organisation eg can reduce staff turnover as individuals feel valued and connected to organisational goals, enhances morale, improves ability to deal with change, increases productivity

2 Understand the characteristics and skills of a coach and coachee

Coach characteristics: qualities eg sense of humour, personable, approachable, discreet, tactful, patient, non-judgemental, determined, empathetic

Coach skills: types eg relationship building, establishing rapport, managing body language, agreeing terms of relationship, setting boundaries, managing time, communicating, active listening and talking in appropriate balance, questioning, allowing thinking time, challenging, goal setting, action planning, summarising, closing, maintaining confidentiality

Coachee characteristics: behaviours eg motivated, patient, flexible, self-disciplined, willing to change

Coachee skills: types eg communication, personal organisation, time management, taking responsibility for actions or inaction

3 Be able to use coaching skills

Demonstrate coaching: coaching skills used; plan for coaching using GROW model (goal, reality, options, way forward)

Review performance: consider feedback eg from observers, evaluation sheets, and own thoughts and feelings; identify aspects needing improvement

Essential guidance for tutors

Delivery

This unit would ideally be delivered by a tutor experienced in coaching or one who can use the services of a coach for demonstration purposes, as learners need the opportunity to learn from watching demonstrations, practising being coached and coaching under supervision.

Free weekend training is available to tutors through The Coaching Academy.

It is advisable for tutors to agree ground rules with learners before coaching sessions begin, to ensure that confidentiality is respected amongst learners and the information shared and goals set are not discussed outside the immediate learning environment, unless the learner or learners concerned have given their permission.

For learning outcome 1, learners need to observe a coaching session. This could be through witnessing the tutor or a guest coach coaching a learner, or by watching DVDs and videos showing demonstrations of coaching. Seeing coaching in action would be a good way to generate group discussions on the purpose of coaching and the benefits to the parties concerned.

A tutor-led discussion on stakeholders may be useful to help learners understand how coaching benefits them. Examples of stakeholders could be family members who are paying for a relative to have coaching, an employer who is funding coaching for an employee, a private coaching business giving free coaching sessions to encourage further business, or an educational institution providing free coaching to learners to help promote effectiveness in their studies.

There are many books and websites devoted to the subject of coaching, which cover its purpose and the associated benefits. Learners could discuss these sources of information as a foundation step before they create their own definition and explain the benefits. Whilst preparation for this learning outcome can be carried out at the beginning of this unit, evidence could be collected at the end when learners have greater knowledge and understanding.

Learning outcome 2 can be achieved, in part, through delivery of the demonstrations referred to above. By witnessing coaching in action learners can see first hand the skills and characteristics of a coach and coachee. Discussion on what they have witnessed is a good starting point for further research into skills and characteristics. To strengthen their understanding of these subjects, learners can work in pairs and be given the opportunity to carry out mini coaching sessions on each other. In coaching and being coached they will understand more clearly what is expected in those roles.

Learning outcome 3 can be achieved by continuing with the same delivery methods but formalising learner observations of coaching so they meet the assessment requirements.

For learners to develop coaching skills, and have confidence in doing so, tutors or guest coaches could lead a simple theoretical session explaining the sequential process of coaching. There are many models used by coaches which can be referred to. The GROW (grow, reality, options, way forward) model is a common one and there are many sources of information on it that learners could explore to help them understand and apply the process of coaching.

Learners will need to practise developing their understanding and proficiency in coaching. Group question and answer sessions could be held at the end of practice sessions as a way of sharing experiences and expanding learning and understanding.

Feedback from other learners and the tutor or designated person will be important so that the coach receives independent comments on their performance. Coach and coachee should be invited to feed back their experience to each other so that both parties can learn and adjust their approach where appropriate.

A short, tutor-led session on how to deliver feedback sensitively is appropriate as comments made could be detrimental to learner confidence and understanding. For this reason discrete and close supervision will be important.

Assessment

To meet 1.1, learners must define the purpose of coaching. They can draw on current definitions but need to create their own. It is probably easiest for learners to complete this after completing work for all the other assessment criteria as they will then have a thorough theoretical and practical understanding of what coaching is.

For 1.2, learners need to provide at least two benefits of coaching for each of the three roles. Real-life or fictional examples should be given to support statements wherever possible.

For 2.1, learners need to explain in detail at least two characteristics and at least two skills of an effective coach.

For 2.2, learners need to explain in detail at least two characteristics and at least two skills of a coachee.

For 3.1, learners must demonstrate coaching skills in a timed coaching session, long enough for them to demonstrate a range of coaching skills. The demonstration needs to be observed by the tutor or another person designated to assess the learner and their comments on learner performance need to be recorded. This information should identify areas for improvement.

To achieve 3.2, learners need to assess either their own performance as a coach or that of another learner. They must identify at least two aspects of the performance that went well and one that did not go quite so well. They can reflect on the performance by watching it played back on video or listening to it on a recording. They may discuss it with their tutor or other designated observer and, following these discussions, record their assessment independently. Learner assessment can be recorded in writing, on video or on tape.

Learners should include why these aspects of performance have been selected and indicate clearly why they were a good or not so good demonstration of a coaching skill. For example, the coach may have given insufficient time to allow the coachee to think and respond by cutting short answering time or interrupting mid sentence, or finishing sentences for the coachee. In this case learners could explain that the reason this has been selected is because it is essential to give the

coachee adequate time to respond. When allowed to use their own powers of expression the coachee may reveal a different meaning or answer to the one the coach expected.

Links to other BTEC units, other BTEC qualifications and other relevant units and qualifications

This unit forms part of the *WorkSkills from Edexcel* suite. This unit has particular links with:

Level 2 WorkSkills	Level 3 WorkSkills
Unit 11: Developing Personal Skills for Leadership	Unit 6: Developing Confidence for Work
Unit 14: Communicating Solutions to Others	Unit 10: Planning for Professional Development
Unit 22: Setting and Meeting Targets at Work	Unit 13: Giving and Receiving Feedback
Unit 23: Solving Work-related Problems	Unit 15: Mentoring Skills for the Workplace

Essential resources

Learners will need access to people who coach.

Indicative reading

Rogers J – *Coaching Skills: a Handbook 2nd Edition* (Open University Press, 2008) ISBN 9780335225521

Whitmore J – *Coaching for Performance, 3rd edition* (Nicholas Brealey Publishing, 2002) ISBN 1857883039

Websites

Coaching for success	www.coach.net/toolmenu.htm
The Chartered Institute of Personnel and Development	www.cipd.co.uk/subjects/lrnanddev/coachmntor/coaching.htm
The Coaching Academy	www.the-coaching-academy.com
The International Coaching Institute	http://www.internationalinstituteofcoaching.org/index.php
Wikipedia	www.wikipedia.org/wiki/Coaching

Unit 15: Mentoring Skills for the Workplace

Unit code:	J/503/2905
QCF Level 3:	BTEC Specialist
Credit value:	2
Guided learning hours:	15

Unit aim

The aim of this unit is to give learners knowledge and understanding of the process and benefits of mentoring, and the opportunity to develop and apply mentoring skills in workplace situations.

Unit introduction

Mentoring is a widespread personal development tool used in the workplace for a variety of reasons, including to support formal training, to help new members of staff integrate into the workplace and to help senior staff in new posts.

In this unit learners will be encouraged to look at how mentoring can benefit them and they will develop a knowledge and understanding of what it involves, including the skills needed to be an effective mentor.

The unit looks at the purpose of mentoring and situations where it is used, in and outside the workplace. Learners will consider the expectations and merits of mentoring for the mentee, mentor and stakeholder.

To develop mentoring skills learners need to examine the stages of the mentoring process.

On completion of the unit, learners will be able to put their understanding into practice and demonstrate and review their mentoring skills. Learners will be expected to participate in a mentoring session.

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 Know the purpose and benefits of mentoring	1.1 Define the purpose of mentoring 1.2 Describe situations when mentoring is commonly used 1.3 Describe the benefits of mentoring to the mentee, mentor and stakeholder
2 Understand the mentoring process	2.1 Explain the mentoring process 2.2 Explain characteristics and skills of a mentor
3 Be able to use mentoring skills	3.1 Demonstrate mentoring skills which are appropriate for an interaction 3.2 Review mentoring performance

Unit content

1 Know the purpose and benefits of mentoring

Purpose of mentoring: types eg to give knowledge, understanding, support and encouragement for personal and professional development, to provide access to the greater experience of others, to utilise expertise and support that may be unique

Mentoring situations: at work eg induction, on-the-job learning, new projects, support for professional development, career progression, redundancy and outplacement; in education eg at school or during further or higher education, when working towards a qualification, for general development, in dealing with changes in life circumstances

Benefits to the mentee: types eg increased job satisfaction, reduced stress and anxiety, increased self-confidence and self-awareness, better self-management, facing limiting beliefs, feeling of being valued and nurtured, increased network

Benefits to the mentor: types eg personal satisfaction of passing on benefit of experience, greater awareness of self including limitations, may receive insights from other perspectives, active participation in office community, reduces personal isolation, increased networks, increased personal reputation

Benefits to stakeholder: organisational improvements eg more productive workforce, increased motivation and morale, increase in staff retention, helps succession planning, reduces financial losses arising from inexperience, creates proactive relationships and unity, encourages loyalty

2 Understand the mentoring process

Mentoring process: three stages: exploration — to decide on the issue(s) to be addressed; understanding — for the mentor to assist the mentee to reach a new understanding about the issue(s); action planning — where both parties create a plan to ensure achievement of their aims; identify the resources needed; safe and supportive environment for mentor and mentee; accessibility and suitability of venue to assist interactions; effects of adverse environment on interaction; affect of interruptions

Characteristics of a mentor: types eg enthusiasm, commitment, willingness, approachability

Skills of a mentor: types eg keeping appointments, rapport building, observing personal boundaries, confidentiality, listening, empathising, questioning, prioritising, informing, advising, guiding, motivating, challenging, decision making, action planning, monitoring progress, evaluating outcomes

3 Be able to use mentoring skills

Demonstrate mentoring: mentoring skills used

Review performance: consider feedback eg from observers, evaluation sheets, own thoughts and feelings; aspects needing improvement

Essential guidance for tutors

Delivery

This unit would ideally be delivered by a tutor who has experience of being a mentor or mentee, or both. Demonstrations of mentoring by tutors or a guest mentor will bring the subject 'alive' and help learners to understand what skills and characteristics are needed for mentoring.

It would be helpful for learners to interview mentors, so that their individual queries can be answered drawing on real-life situations. It would also be beneficial if mentees could be invited to meet learners and share their experience of mentoring. Learners may also have been involved with mentoring and should be encouraged to share their experiences.

To achieve learning outcome 1, learners can draw on the tutor's knowledge and understanding, guest mentors and mentees, other learners and information found on websites and in textbooks. They could listen to discussions, learn through questions and answers, find information from directed private study or work in pairs or small groups.

A tutor-led discussion on stakeholders may be useful to help learners understand how mentoring benefits them.

Whilst preparatory work for this learning outcome could be carried out at the beginning of the unit, evidence could be collected at the end when learners will have a greater awareness.

Learning outcome 2 can be partially achieved through delivery of the demonstrations referred to above. In witnessing mentoring sessions, learners can see at first hand the skills and characteristics of an effective mentor. Discussion on what they have witnessed is a good starting point for further research into skills and characteristics.

To strengthen their understanding, learners can work in pairs and be given the opportunity to carry out a mini mentoring session on each other. In mentoring and being mentored they will understand more clearly what is expected in those roles.

To undertake mentoring in a meaningful way learners could form pairs where one learner has more experience and knowledge of a topic which can be used as the subject matter of the mentoring. This could be a subject such as hobbies, using computers, social activities, coping with work or education, dealing with family or friends etc. Tutors will need to check the viability of the proposed mentoring aims.

Learners can swap partners and create new mentoring aims, so that they have experience of mentoring several learners. In addition, volunteer mentees can be invited to receive mentoring sessions. Suitable volunteers could be less experienced peers from the same workplace or educational establishment. Tutors will need to ensure pairs are matched appropriately and mentoring aims are realistic.

Learning outcome 3 can be achieved by continuing with the same delivery methods but formalising learner observations of mentoring so they meet the assessment requirements. Learners could work in different pairs to broaden their experience and give mentoring advice on topics they have already chosen.

For learners to develop mentoring skills, and have confidence in doing so, tutors or guest mentors could lead a simple theoretical session explaining the sequential process of mentoring. Learners could be guided to use the three stages: exploration – to decide on the issue(s) to be addressed; understanding – for the mentor to assist the mentee to reach a new understanding about the issue(s) and action planning where both parties create a plan to ensure achievement of their aims.

Learners will need to practise developing their understanding and proficiency in mentoring. Group question and answer sessions could be held at the end of practice sessions as a way of sharing experiences and expanding learning and understanding.

Mentors and mentees should be invited to feed back to each other their experience so that both parties can learn from it. Feedback from other learners, the tutor or designated person will also be important so that mentors receive independent comments on their performance.

A short, tutor-led session on how to deliver feedback sensitively is appropriate as comments made could be detrimental to learner confidence and understanding. For this reason discrete and close supervision is important.

Assessment

To achieve 1.1, learners must describe the purpose of mentoring.

For 1.2, learners need to explain at least two situations (which may be real or hypothetical) where mentoring is used in the workplace.

For 1.3, learners need to explain at least two benefits of mentoring for the mentor, at least two for the mentee and at least two for the stakeholder. The explanation must be supported with real or hypothetical examples.

For 2.1, learners need to describe the mentoring process through creating aims for one mentoring session they have prepared.

To achieve 2.2, learners need to describe at least two characteristics and at least two skills of an effective mentor and explain why these are important.

For 3.1, learners must demonstrate mentoring skills in a timed mentoring session. The demonstration needs to be observed by the tutor or another person designated to assess learners and their comments on learner performance need to be recorded. This information should include areas for improvement.

To achieve 3.2 learners need to either assess their own performance as a mentor or that of another learner. They must identify at least two aspects of the performance that went well and one that did not go quite so well. They can reflect on the performance by watching it played back on video or listening to it on a recording. They may discuss it with their tutor or other designated observer and, following these discussions, record their assessment independently.

Learners should include why these aspects of performance have been selected and indicate clearly why they were good or not so good demonstrations of a mentoring skill.

Evidence for this unit may be written or recorded on audio or video tape.

Links to other BTEC units, other BTEC qualifications and other relevant units and qualifications

This unit forms part of the *WorkSkills from Edexcel* suite. This unit has particular links with:

Level 2 WorkSkills	Level 3 WorkSkills
Unit 8: Self-management Skills	Unit 6: Developing Confidence for Work
Unit 14: Communicating Solutions to Others	Unit 10: Planning for Professional Development
Unit 15: Effectiveness at Work	Unit 13: Giving and Receiving Feedback
Unit 18: Building Working Relationships with Colleagues	Unit 14: Coaching Skills for the Workplace
	Unit 17: Managing a Work-life Balance

Essential resources

There are no essential resources for this unit.

Indicative reading

Alred G, Garvey B – *The Mentoring Pocketbook 3rd Edition* (Management Pocketbooks, 2010) ISBN 1906610207

Websites

The Chartered Institute of Personnel and Development	www.cipd.co.uk/subjects/lrnanddev/coachmntor/mentor.htm?IsSrchRes=1
The Coaching and Mentoring Network	www.coachingnetwork.org.uk/ResourceCentre.htm
The University of Nottingham mentoring advice	http://pd.nottingham.ac.uk/eng/Personal-Development/Mentoring/Mentoring-Skills

Unit 16: Bullying in the Workplace

Unit code:	L/503/2906
QCF Level 3:	BTEC Specialist
Credit value:	1
Guided learning hours:	10

Unit aim

The aim of this unit is to give learners knowledge and understanding of the impact of bullying in the workplace on both the individual and organisation, and how this can be resolved.

Unit introduction

Bullying in the workplace is an important issue as it has been estimated that over half the working population in Britain can expect to experience bullying at work, either directly by being bullied or by witnessing it, at some point in their working lives. Organisational bullying can cause serious damage to individuals and organisations. In this unit learners will examine a range of measures which employers can put in place to tackle bullying, and approaches individuals can adopt if they are being bullied.

It is important, therefore, for everyone in work to be informed about bullying to enable the issue to be addressed, by empowering individuals to resist bullying and supporting those who are victims of bullying.

In this unit learners will examine what bullying in an organisation is, how it may be recognised and the effects of bullying on employers and individuals.

On completion of the unit, learners will be able to investigate measures employers use to combat bullying and research strategies that victims of bullying can use.

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 the effects of bullying in an organisation	1.1 Explain reasons for bullying behaviour in an organisation 1.2 Analyse the effects of bullying in an organisation on individuals and employers
2 Know about resolution of bullying in an organisation	2.1 Describe how employers can combat bullying in an organisation 2.2 Describe what action an individual could take to deal with bullying in the organisation

Unit content

1 Understand the effects of bullying in an organisation

Bullying definition: behaviour eg intimidation of another employee, often in front of colleagues, abuse of power, usually done to someone in a less senior position eg by manager, supervisor, mentor; unwarranted; may be by one individual against another individual; may involve groups of people; may be obvious or insidious; may be face to face, written, by email or phone; form of harassment

Bullying behaviour: actions eg persistent, negative, humiliation, often unpredictable, irrational, unfair eg constant criticism, takes away responsibilities, allocates trivial tasks, shouting, opinions ignored, impossible deadlines set, being set up to fail, ridicule, victimisation, physical abuse, humiliation, overbearing supervision

Effects of bullying on individuals: feelings of victimisation eg self-doubt about abilities, sense of injustice, anxiety, humiliation, anger, frustration, feelings of being unable to cope, fear of losing job, think complaining will exacerbate bullying, desire to retaliate, fear, demotivation, loss of confidence and self-esteem, stress; effects on health eg headaches, nausea, sleeplessness, ulcers, high blood pressure, depression

Effects of bullying on employers: range eg low staff morale, high staff turnover, increased sickness absence, low productivity, could result in legal costs eg fines, compensation following employment tribunal

2 Know about resolution of bullying in an organisation

Action by employers to combat bullying: policies and procedures eg legal duty under Health and Safety at Work Act 1974 to ensure health, safety and welfare of employees, grievance procedures, complaints procedures, anti-bullying policies, whistle blowing policies, exit interviews

Action by employees to combat bullying: actions eg direct approach to the perpetrator eg bullying may not be deliberate, bully may not recognise they are being aggressive or manipulative, present evidence, speak to a trusted person, speak to human resources manager, speak to senior member of staff or line manager, speak to union representative, have a friend or union representative at meetings connected with a complaint, make a formal complaint through the grievance procedure, seek professional advice about legal action

Essential guidance for tutors

Delivery

Delivery methods for this unit could include learner-centred tasks such as group work, research tasks and learner-led presentations. Television programmes or extracts from films can also be a valuable learning tool. Guest speakers and activities such as role play will help learners relate the unit content to the workplace.

Delivery could start with considering the behaviour that constitutes bullying before focusing on bullying in the workplace. Recognition of bullying behaviour is potentially a sensitive area and should be approached with the appropriate degree of sensitivity and respect. These issues should be discussed with learners before exploring forms of bullying through a 'thought shower' activity or whole-class discussion.

Analysis of video footage of television programmes such as *The Apprentice* will help learners to appreciate the form bullying can take in the workplace.

Role playing different situations that may occur in organisations will help learners to identify bullying behaviour. Analysing case studies of individuals who have been bullied in the workplace will help learners to understand how individuals may be affected by bullying. Learners could work in groups to research the different effects on the physical and emotional health of individuals. Learners could present their findings to the whole group using PowerPoint or posters.

Learning outcome 2 could be introduced by inviting a guest speaker, such as a human resources manager, to speak about the effects on organisations if bullying occurs, and strategies organisations use to combat bullying. Learners could work in small groups to investigate the policies different organisations have in place to combat bullying. Each group could identify the best grievance procedures, anti-bullying policies, complaints procedures, and whistle blowing policies, and feed back to the whole group justifying their reasons.

How individuals should respond to bullying of themselves or a colleague could be explored through discussion of different 'what if' situations. Learners could work in groups and present their solutions to the whole group as role play or presentations.

Assessment

Assessment criteria for this unit can be combined into one assessment task of producing guidance for a new employee on bullying in the workplace.

To meet 1.1, learners must explain in detail at least two bullying behaviours in the workplace. Examples may be given to support their response.

To meet 1.2, learners need to analyse at least two ways in which the physical and emotional health of an individual can be affected by bullying at work and how an organisation is affected by bullying. Examples may be given to support their response.

For 2.1, learners need to describe at least two different actions employers can take to combat bullying in the workplace. For each action, learners must make it clear how the action is effective in combating bullying.

For 2.2, learners must describe at least two actions an employee could take to deal with bullying in the organisation.

Links to other BTEC units, other BTEC qualifications and other relevant units and qualifications

This unit forms part of the *WorkSkills from Edexcel* suite. This unit has particular links with:

Level 2 WorkSkills	Level 3 WorkSkills
Unit 8: Self-management Skills	Unit 13: Giving and Receiving Feedback
Unit 9: Self-assessment	Unit 17: Managing a Work-life Balance

Essential resources

There are no essential resources for this unit.

Indicative reading

Clifford L — *Survive Bullying at Work (Steps to Success)* (A & C Black Publishers Ltd, 2006) ISBN 0713675209

Field T — *Bully in sight. How to predict, resist, challenge and combat workplace bullying* (Success Unlimited, 1996) ISBN 0952912104

Namie G and Namie R — *The Bully at Work: What You Can Do* (Sourcebooks, 2000) ISBN 1570715343

Websites

Advisory, Conciliation and Arbitration Service (ACAS) — downloadable advice leaflet — Bullying and harassment at work: Guidance for employees www.acas.org.uk/index.aspx?articleid=797

Resource on workplace bullying and related issues www.bullyonline.org

Trades Union Congress (TUC) www.tuc.org.uk/tuc/rights_bullyatwork.cfm

Unit 17: Managing a Work-life Balance

Unit code:	R/503/2907
QCF Level 3:	BTEC Specialist
Credit value:	1
Guided learning hours:	10

Unit aim

The aim of this unit is give learners an understanding of the benefits of a work-life balance, together with the skills for planning strategies to manage stress which can impact on this balance

Unit introduction

Work-related stress can cause chronic illness, physical and emotional, and affect personal relationships. A large percentage of working days are lost due to work-related illness, affecting productivity. In this unit learners will investigate the importance of being able to maintain a balance between work and life for individuals, families, employers and society.

Employers have a statutory duty to provide flexible working. Many employers recognise the benefits to their business of enabling employees to have a work-life balance. In this unit learners will examine a range of schemes that are in place to enable this to happen. Individuals have a responsibility to consider their own work-life balance in relation to their personal circumstances and make plans to reduce the stress in their lives, to benefit their health, personal relationships and as an employee.

Learners will explore the importance of a work-life balance to employees and employers such as improved staff retention and employees feeling valued. Learners will consider how employers can support their employees to achieve a work-life balance. Not all stress is negative and learners will examine the causes of excessive stress and investigate a range of ways in which stress can be managed.

On completion of the unit, learners will be able to identify own stress triggers to plan their own work-life balance to meet personal requirements and work obligations.

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 Know about a work-life balance	1.1 Describe ways employers provide work-life balance 1.2 Outline the benefits of work-life balance to employees and employers
2 Understand the impact of stress on the work-life balance	2.1 Explain the effects of stress on work-life balance 2.2 Analyse ways to manage stress
3 Be able to manage a work-life balance	3.1 Plan strategies to use when planning a work-life balance 3.2 Create a plan for managing work-life balance

Unit content

1 Know about a work-life balance

Work-life balance: flexible working patterns eg flexitime, compressed hours, home working, job sharing, term-time contracts, shift working, part-time working; statutory rights eg childcare vouchers, paternal leave, emergency leave; health eg occupational health schemes, private healthcare benefits, mentors, career breaks, sabbaticals, unpaid leave; driven by HR and government initiatives

Benefits for employers: types eg improved staff retention, easier recruitment, increased employee motivation, increased productivity, improved sales, better customer service, longer opening hours, increased profits, reduced training costs, reduced employee absence

Benefits for employees: types eg feel valued, commitment to organisation, improved mental and physical health, reduced stress, improved relationships eg work and personal, able to follow interests and hobbies, gives individuals control over when, where and how they work, a fulfilled life inside and outside paid work which benefits individuals, employers and society

2 Understand the impact of stress on the work-life balance

Stress: definition eg normal physical response to events that make individuals feel threatened, helps individuals stay focused, energetic and alert; enables individuals to respond in emergency situations (fight or flight), enables individuals to rise to meet challenges, sharpens concentration

Effects of stress on individuals: physical effects eg sleep difficulties, indigestion, tiredness, difficulty concentrating; emotional effects eg increased irritability, tension, indecision, anxiety, depression

Stress management: diagnosis eg symptoms of stress, identify the causes, take action to address the causes and thereby reduce the symptoms; take steps to relieve the symptoms until the underlying causes have been addressed eg exercise, healthy diet, time management; relaxation techniques

3 Be able to manage a work-life balance

Planning a work-life balance: strategies eg consider aspirations, career, personal requirements and needs eg mind map, 'thought showers', gap analysis, action plan, prioritise, learn to say no, time management techniques eg weekly plan, to do lists, block out time for exercise, family, hobbies, delegate

Essential guidance for tutors

Delivery

A wide range of delivery methods can be used in this unit, including presentations, demonstrations, case studies and guest speakers.

To introduce the unit, a question and answer session should establish learner understanding of the concept of work-life balance. It is likely that learners will have a wide range of personal experiences of managing their work-life balance and tutors could encourage learners to share their experiences.

Learners could work in small groups to examine the benefits different companies offer to their employees. Each group could feed back their findings to the whole group and the range of benefits could be collated on a flipchart. Learners could work in pairs to identify how each benefit offered could enable different employees, outlined in case studies, to balance their work and life. A human resources manager or an employer could be invited as a guest speaker. Learners could prepare questions about the advantages to an organisation of offering employees the different benefits.

For learning outcome 2, learners could explore the importance of stress as a normal response by analysing scenarios of different emergency situations, for example a house fire, a riot, a serious car accident, to recognise the significance of the stress response. Tutor-led discussion could help learners to be aware of how stress helps individuals to stay alert and focused.

Learners could research the effects of excessive stress on physical and emotional health and share their findings with the group. A question and answer session could encourage learners to consider different ways to manage stress, by identifying the causes and taking action to address them before managing the symptoms. Learners could work in small groups to carry out internet research to investigate different ways to manage the symptoms of stress including a range of relaxation techniques and complementary therapies. Each group could present their findings to the whole group and provide a factsheet for the other learners. Guest speakers could be invited to demonstrate different relaxation techniques or complementary therapies.

To introduce learning outcome 3, a group discussion could help learners to consider what needs to be considered in planning for a work-life balance, starting with the personal requirements of the individual and their work obligations. The advantages and disadvantages of different time management techniques can be compared. Learners could work individually to produce a plan for their own work-life balance.

Assessment

The assessment criteria for this unit may be combined into one assessment task. Learners could present the information as an article for a newspaper or as information leaflet for customers of an employment agency.

To meet 1.1, learners need to describe at least two different ways in which employers provide an environment for a positive work-life balance such as different work patterns, childcare benefits and leave options.

For 1.2, learners need to outline at least two ways employees benefit from a work-life balance and at least two ways employers benefit from ensuring their employees have a work-life balance. Examples may be given to support the response..

For 2.1 learners need to explain the effects of stress on work-life balance including effects on both physical and emotional health. Case studies may be used to support the explanation.

To meet 2.2, learners need to explain how stress can be managed.

For 3.1, learners must plan at least two different ways an individual can manage their own work-life balance. They could include an example of how they plan to manage their own work-life balance.

For 3.2, it is possible to use college/school for learners to create a plan for managing learning/life balance if they are not yet in work. Alternatively, it might be possible to use tutors, parents or friends who are working, as models to devise a work-life balance for.

Links to other BTEC units, other BTEC qualifications and other relevant units and qualifications

This unit forms part of the *WorkSkills from Edexcel* suite. This unit has particular links with:

Level 2 WorkSkills	Level 3 WorkSkills
Unit 8: Self-management Skills	Unit 1: Career Development
Unit 15: Effectiveness at Work	Unit 19: Skills for a Portfolio Career

Essential resources

There are no essential resources for this unit.

Indicative reading

Mumford J and Lockett K — *Work-life Balance for Dummies* (John Wiley & Sons, 2009) ISBN 0470713801

Richards M, Hailstone P — *Stress Pocketbook 2nd Ed* (Management Pocketbooks, 2009) ISBN 1 1906610096

Websites

Am I stressed? questionnaire	www.timesonline.co.uk/tol/life_and_style/health/article4759355.ece
Chartered Institute of Personnel and Development (CIPD) — guidance for employers	www.cipd.co.uk/subjects/health/worklifebalance/worklifeba.htm
Government website — flexible working and work-life balance	www.direct.gov.uk/en/Employment/Employees/WorkingHoursAndTimeOff/DG_10029491
Stress Management Society — identifying and reducing stress tips	www.stress.org.uk
Trades Union Congress — Hazards at Work	www.tuc.org.uk/h_and_s/stress.cfm

Unit 18: Project Management Skills

Unit code:	Y/503/2908
QCF Level 3:	BTEC Specialist
Credit value:	1
Guided learning hours:	10

Unit aim

The aim of this unit is to give learners the knowledge, understanding and skills required to plan a project for successful completion on time and within budget.

Unit introduction

Projects are a part of many work situations such as moving to a new office, organising a conference, or marketing a new product or service. In this unit learners will develop their understanding of how to manage complex activities and tasks using the concepts of project management, and have the opportunity to develop the required skills.

Project management skills are transferable and can be applied to a range of situations both in work and personal life. Planning and leading a project is a significant achievement, whatever the project's size and complexity. The personal skills developed in this process and the experiences gained are important to employers.

Learners will explore the need for projects to be managed and will learn about the concept of project management. The skills required to manage projects efficiently are investigated, and learners will analyse their own project management skills.

On completion of the unit, learners will be able to apply skills and knowledge to plan a project to an agreed specification.

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 Know the purpose and process of project management	1.1 Describe the purpose of project management 1.2 Outline the process of project management
2 Understand skills and knowledge required for project management	2.1 Explain the skills and knowledge needed for project management 2.2 Analyse own skills for project management
3 Be able to plan a project to a given specification	3.1 Outline details of a selected project to a given specification 3.2 Develop a plan to manage a selected project to a given specification

Unit content

1 Know the purpose and process of project management

Purpose of project management: definition of a project; reasons for project management eg way of managing complex tasks and activities, needed where different outcomes are possible, considers all options, includes needs of all stakeholders, enables all activities and resources to be planned to achieve outcomes, considers activities in parallel, includes risk management; applies to projects of different sizes and complexity; can be applied to wide range of projects eg services, materials, production, storage, distribution, selling, marketing; human resources, quality

Process of project management: consult stakeholders eg customers, project manager, project team; establish goals, agree precise specification; plan project eg stages, activities, critical path analysis, project timescales, build in slippage, pick project team, financial planning, contingency planning, inform team, delegate tasks, motivate team, check and measure progress, adjust plans, keep team informed, complete project, review and report outcomes

2 Understand skills and knowledge required for project management

Skills for managing a project: types eg leadership, organisational, attention to detail, methodical, planning, persistent, motivating, accurate and precise communicator, time management, cost conscious, accurate record keeper, risk management, able to manage others, good facilitator, accountable, honesty, negotiation, able to solve problems

Knowledge for managing a project: types eg content of project agreed by all stakeholders, timescales agreed, purpose clear

Self-analysis: types eg personal skills audit, matching own skills with skills required for project management, recognition of gaps in own skills

3 Be able to plan a project to a given specification

Project planning: tasks eg consultation with stakeholders, project specification (terms of reference), project schedule, risk management strategy, process management eg monitor progress and quality of work, periodic review, milestone evaluation, spreadsheet to monitor budget/cash flow, keep team informed, project handover, how project will be evaluated

Essential guidance for tutors

Delivery

As many practical activities as possible should be included to help learners relate the theoretical concepts and models in the unit content to practical work situations. A wide range of techniques, including presentations, seminars and guest speakers, can support learning. Additional learning resources include journals, video, DVDs, case studies, presentations and group work.

To introduce this unit, learners could consider projects they have been involved in, for example small-group work assignments in a learning situation, enterprise activities with a voluntary organisation or jobs in a work situation. Further discussion will help learners to appreciate that projects can come in different shapes and sizes, from the small and straightforward to extremely large and highly complex.

A question and answer session could establish why projects need to be managed and what could result if projects were not managed carefully. Learners could use their own experiences to explore reasons for careful project management which could be collated on a flipchart. Learners could research the process of project management using the internet and present their findings as a flow chart. Tutors could explain the use of critical path analysis and Gantt charts in the project management process.

In small groups learners could consider case studies of different projects to identify how the different stages in the project management process were applied. Learners could feed back their findings to the whole group.

For learning outcome 2, guest speakers with project management experience could be invited to speak about different projects that they have managed. Learners could prepare questions to ask the speakers about the range of skills project managers require and why these skills are crucial to successful project outcomes. Learners could work independently to consider their own project management skills.

Learners will need to work independently to plan a project from a specification for learning outcome 3, applying the process of project management. The terms of reference for the project may be suggested by learners, supported by the tutor. Learners who are in work or work experience could discuss a suitable project specification with their supervisor or line manager. Alternatively, tutors may provide different project specifications for learners to select from, for example an assignment or a piece of coursework.

Assessment

Assessment criteria 1.1, 1.2 and 2.1 may be combined into one assessment task as a leaflet providing information for an employee who is new to project management.

For 1.1, learners need to describe at least two different reasons for project management. Examples may be given to support their response.

For 1.2, learners need to give a clear outline of the key procedures required in project management and the order in which they need to be undertaken. This may be presented as a flow chart with notes. Other forms of evidence may be used.

For 2.1, learners need to explain why at least two skills and at least two areas of knowledge are required for successful project management.

For 2.2, learners need to consider the effectiveness of their own project management skills. Learners must include a personal analysis of the required skills. The analysis may be supported with examples of situations where the learner has demonstrated these skills.

For 3.1, learners need to outline a selected project to a given specification.

For 3.2, learners need to demonstrate how the selected project in 3.1 will be managed, showing briefly what will happen at each stage of the project management process. This may be presented in the form of a chart or a mind map. Other forms of evidence may be used such as a presentation with PowerPoint, recorded or supported by a witness statement from the tutor.

Links to other BTEC units, other BTEC qualifications and other relevant units and qualifications

This unit forms part of the *WorkSkills from Edexcel* suite. This unit has particular links with:

Level 2 WorkSkills	Level 3 WorkSkills
Unit 8: Self-management Skills	Unit 1: Career Development
Unit 15: Effectiveness at Work	Unit 20: Skills for Starting a Business

Essential resources

There are no essential resources for this unit.

Indicative reading

Billingham V — *Project Management: How to Plan and Deliver a Successful Project* (Studymates Ltd, 2008) ISBN 1842851306

Graham N — *Project Management for Dummies, UK Edition* (John Wiley & Sons, 2010) ISBN 0470711191

Posner K — *Project Management Pocketbook* (Management Pocketbooks, 2008) ISBN 9781903776872

Websites

Creating a Gantt chart using Excel	www.projectsmart.co.uk/creating-a-gantt-chart-using-excel.html
Critical path analysis	www.businessballs.com/project.htm
Introduction to project management	www.projectsmart.co.uk/introduction-to-project-management.html

Unit 19: Skills for a Portfolio Career

Unit code:	D/503/2909
QCF Level 3:	BTEC Specialist
Credit value:	1
Guided learning hours:	10

Unit aim

The aim of this unit is to give learners the knowledge, understanding and skills required to plan the development of skills suitable for portfolio working in order to maximise work opportunities.

Unit introduction

This unit introduces learners to a relatively new concept and way of thinking for working life, that of portfolio management or portfolio working. This reflects changes in the job market meaning people can no longer rely on 'jobs for life', but rather should have a flexible approach to work and expect to manage a number of different roles or jobs at the same time. Traditionally, this might have been the working experience of an actor or freelance journalist, but not for those who take up more conventional roles such as administration and management professions.

In this unit learners will increase their awareness of how to make a living without having a full-time permanent job and develop their understanding of how they might use their work skills in the marketplace. Learners will have the opportunity to explore the practicalities of utilising a range of skills and having several jobs, in particular the effect this can have on work satisfaction, income and earning potential.

In this unit learners will investigate the concept of portfolio working, exploring what types of employment are suited to this way of working. They will consider the risks, as well as the benefits to be enjoyed from variable work arrangements.

Learners will also look at the skills suited to portfolio working and will have the opportunity to analyse their own work skills and assess their current suitability to be a portfolio worker.

On completion of the unit, learners will be able to plan to develop their work skills to increase their future work options.

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 Know the benefits and risks of portfolio working	1.1 Describe what is meant by portfolio working 1.2 List the benefits of portfolio working 1.3 List the risks of portfolio working
2 Understand the skills and knowledge suitable for portfolio working	2.1 Explain work skills needed for portfolio working 2.2 Assess suitability of own skills and knowledge for portfolio working
3 Be able to develop portfolio working skills	3.1 Set objectives to plan development of portfolio working skills 3.2 Prepare an action plan to develop own portfolio work skills

Unit content

1 Know the benefits and risks of portfolio working

Portfolio working: definition eg having several jobs some of which may be on a part-time, fixed term, job share, temporary or flexi hours arrangement, perhaps combined with some self-employed contract work

Benefits: range eg skills provide job security, own boss, can fit around needs of dependents, more flexibility to work from home, variety, if one job finishes others keep income coming in and can provide a greater/multiple service

Risks: financial eg uncertainty in income stream, manage own tax and National Insurance; own legal liability for work activities, no employer benefits eg holiday and sick pay if totally self-employed; career eg depends on history and age, may have no track record of permanent work, need to invest in own training and updating of skills and knowledge, long hours, isolation, relies heavily on networks and self-marketing, sole decision

2 Understand the skills and knowledge suitable for portfolio working

Skills: work eg any skills that are marketable eg administrative, managerial, marketing, designing, selling, teaching, training, practical/trade skills

Knowledge: types eg specialist, in demand, rare, exclusive

Audit: activities eg own skills review for suitability

3 Be able to develop portfolio working skills

Plan: skills needed eg skills audit, identifying personal gaps, use resources to aid planning eg websites, online learning, courses; devise action plan eg establish priorities, SMART goals; progress review

Essential guidance for tutors

Delivery

Delivery of this unit might best be achieved through learners interviewing someone, either real or hypothetical, who is managing a portfolio of different jobs. Learners need to explore the concept, to understand what a portfolio might contain in terms of a range of work, and then examine the benefits and risks.

Certain sectors have always required this type of working and looking at acting, journalism, catering, for example, could be a helpful starting point.

Guest speakers from all walks of life could show how a living can be made and enjoyed through having two or more jobs at once. Tutors might be able to find portfolio workers amongst friends, family and fellow members of staff. An HR department may be able to provide examples and links to other good examples. Most self-employed people have a range of skills they use to earn multiple income streams.

However, if none of this is possible, the tutor could role play being a portfolio worker and learners could prepare a set of questions to ask in an information gathering exercise. It is these examples, and listening to what portfolio workers have to say, that will develop a persuasive, informative and clear understanding of what portfolio working is about.

Learning outcomes 1 and 2 can be achieved through question and answer sessions and discussions with guest speakers. Learners need to interview portfolio workers they know. They can also work on their own or in pairs to identify their own skill set, after hearing what would be most suitable. Learners could use a SWOT analysis, compiling a table mapping own skill set against those skills suited to portfolio working.

For learning outcome 3, it is recommended that a skills development plan template is discussed and agreed as a group activity. With all learners using the same template, it will help to ensure assessment criteria are met and will make marking easier.

Assessment

To meet 1.1, learners must describe what is meant by portfolio working. The description must be clear and understood by someone who knows nothing about the subject.

To achieve 1.2, learners need to list at least two benefits of and at least two other issues relating to portfolio working. Real or hypothetical examples should be given for the benefits and issues listed.

For 1.3, learners need to list at least two financial risks, two career risks, and two other risks relating to portfolio working. At least two real or hypothetical examples, in total, should be given to support their response.

To achieve 2.1, learners need to show they understand the underlying principle that any skill someone is willing to pay for is a source of paid work, and if it is carried out other than on a full-time permanent basis, it can be part of a portfolio of work skill. Learners need to explain at least two examples of these skills.

For 2.2, learners could produce a grid listing the work skills they have identified and map their own skills against this, together with a summary of their personal position. Alternatively, a skills audit could be carried out using IT or careers questionnaires.

For 3.1, learners need to set objectives for planning their personal skills development, ensuring these are SMART. For 3.2, an action plan must be produced showing planned development of further portfolio skills. It must be obvious what new skills learners are planning to develop. It must also be clear what resources they are going to use and how they will gain practical experience. Actions must be prioritised clearly and specific, realistic, time- bound and measurable goals set. Learners must also include dates to review their progress. Sufficient detail must be provided in the plan so that anyone could read it and know what actions to follow and how to carry them out.

Links to other BTEC units, other BTEC qualifications and other relevant units and qualifications

This unit forms part of the *WorkSkills from Edexcel* suite. This unit has particular links with:

Level 2 WorkSkills	Level 3 WorkSkills
Unit 8: Self-management Skills	Unit 2: Maximising Potential when Applying for a Job
Unit 15: Effectiveness at Work	Unit 3: Strategies to Improve Job Interview Skills
Unit 14: Communicating Solutions to Others	Unit 18: Project Management Skills

Essential resources

Learners will need access to hear the personal work histories of current portfolio workers. Guest speakers are therefore essential.

Indicative reading

Handy C — *The Empty Raincoat/Making Sense of the Future* (Arrow Business Books, 1995) ISBN 0099301253

Hopson B – *And What Do You Do? 10 Steps to Creating a Portfolio Career* (A & C Black Publishers Ltd, 2009) ISBN 1408116308

McCrudden C, Bourne A and Lyons C - *Building a Portfolio Career: How to Create a Portfolio of Roles to Suit Your Work and Life* (Management Books, 2009) ISBN 185252622X

Website

Freelance advisor www.freelanceadvisor.co.uk/2008/12/15/freelance-advice-portfolio-working-and-how-to-go-about-it

Unit 20: Skills for Starting a Business

Unit code:	R/503/2910
QCF Level 3:	BTEC Specialist
Credit value:	1
Guided learning hours:	10

Unit aim

The aim of this unit is to give learners an understanding of the skills required to start up a business, through reviewing own skills and planning for the development of their personal and work skills.

Unit introduction

Starting a business is exciting and challenging and requires the application of a wide range of personal and work skills, including team working skills, leadership skills, communication and interpersonal skills, time management and creative skills.

Essential work skills include being able to prepare a business plan, raise finance, manage projects and employ staff. In this unit learners will develop these skills and have the opportunity undertake a personal evaluation of their own skills in relation to starting a business.

Learners will explore both the personal and work skills required to set up a business successfully. On completion of the unit, learners will be able to review their own personal and work skills to plan to develop their skills and expertise to start a business.

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 skills required for starting up a business	1.1 Explain personal skills required for starting up a business 1.2 Explain work skills required to start up a business
2 Be able to review own personal and work skills required to start up a business	2.1 Assess own personal and work skills for starting up a business 2.2 Prepare an action plan to develop skills for starting up a business

Unit content

1 Understand skills required for starting up a business

Personal skills for starting up a business: types eg hard working, committed, determined, organised, time management, communication and interpersonal skills, decision making, problem solving, focused, able to take advice, able to sell, flexible and adaptable, opportunist, intuitive, risk taker, creative and imaginative, resilient, team worker, leadership skills

Work skills for starting a business: types eg market research, preparing a business plan, raising finance, costing, purchasing stock and equipment, cash flow, stockholding and stock control, sales, marketing, employing and managing staff, project management, business law

2 Be able to review own personal and work skills required to start up a business

Review of personal skills required to set up a business: skills audit eg working as a member of a team, leadership skills, communication and interpersonal skills, time management, creative skills; SWOT analysis, feedback from others

Review of work skills required to set up a business: skills audit eg knowledge of business planning, experience of market research, marketing, pricing, project management, setting sales targets, finances, cash flow

Areas for development: identify areas to develop following self-evaluation eg refine time management skills, undertake further training in business skills, research marketing techniques; develop action plan eg set SMART goals

Essential guidance for tutors

Delivery

A wide range of delivery methods can be used in this unit, including tutorials, presentations, videos, worksheets and internet research. As many practical activities as possible should be included to help learners relate to the unit content.

Learners need to be introduced to the processes involved in setting up a business, as many learners may not have any experience of this. Learners could research the different aspects of setting up a business, such as business planning, market research and project management, and prepare a short presentation to the rest of the group.

The key processes could be collated and presented on the board or flipchart. A question and answer session could be used to establish whether the processes can be applied to setting up different types of business. Learners could compare the business plans of different organisations and identify how the different processes have been approached.

So learners understand the skills required to set up a business, they can watch videos of *Dragons' Den* to identify the skills demonstrated by successful entrepreneurs. Learners could compile a list of these skills and share their answers with the group to agree the range of required skills.

In small groups learners could analyse the importance of the skills required for these processes and then report back to the rest of the group. A guest speaker with experience of setting up a business could be invited to speak about their experiences and the importance of both personal and professional skills to the success of a business.

For learning outcome 2, learners could investigate their personal and professional skills in relation to starting up business through the use of self-assessment tools, such as a SWOT analysis. Strengths and gaps could be identified so individuals become aware of their development needs and recognise the advantage of relevant work and study opportunities to develop both their personal and professional skills. Tutor input on the importance of setting SMART objectives, followed by learners setting their own objectives, would be the basis for an action plan.

Assessment

Assessment criteria 1.1 and 1.2 may be combined into one assignment task.

For 1.1, learners need to explain different personal skills needed to start up a business and explain why each skill is required.

For 1.2, learners need to explain the work skills required to start up a business. Evidence may be presented as PowerPoint slides with accompanying notes. Other forms of evidence such as a leaflet may also be used.

2.1 and 2.2 may be combined into one assignment task. For 2.1, learners could carry out a self-assessment of the effectiveness of at least two personal and at least two work skills. Examples of situations where they have demonstrated these skills need to be included in the assessment.

For 2.2, learners must recognise aspects of their personal and professional skills which need improving and/or developing in order to set up a business successfully, and produce a plan with SMART objectives to develop these skills.

Links to other BTEC units, other BTEC qualifications and other relevant units and qualifications

This unit forms part of the *WorkSkills from Edexcel* suite. This unit has particular links with:

Level 2 WorkSkills	Level 3 WorkSkills
Unit 8: Self-management Skills	Unit 6: Developing Confidence for Work
Unit 14: Communicating Solutions to Others	Unit 8: Personal Skills for Leadership
Unit 16: Working in a Team	Unit 18: Project Management Skills

Essential resources

There are no essential resources for this unit.

Indicative reading

Barrow C — *Starting a Business for Dummies, 2nd Edition* (John Wiley & Sons, 2007) ISBN 0470516488

Branson R — *Screw It, Let's Do It* (Virgin Books, 2006) ISBN 0753510995

Green J — *Starting Your Own Business: The Bestselling Guide to Planning and Building a Successful Enterprise, 5th edition* (How To Books Ltd, 2008) ISBN 1845283120

Websites

Advice from Barclays Bank about starting a business	www.barclays.co.uk/business/starting-a-business
Business Link is a free business advice and support service	www.businesslink.gov.uk
Online resource for starting a business	www.startups.co.uk
Peter Jones' TV website and resources	http://www.peterjones.tv/
Prince's Trust — advice and support for young people setting up a business	http://www.princes-trust.org.uk/
SWOT analysis template	www.businessballs.com/swotanalysisfreetemplate.htm

Unit 21: Critical Thinking

Unit code:	Y/503/2911
QCF Level 3:	BTEC Specialist
Credit value:	2
Guided learning hours:	15

Unit aim

The aim of this unit is to give learners knowledge and understanding of the importance of having critical thinking skills in the workplace, together with the opportunity to develop these skills.

Unit introduction

Employers require staff to think critically in and around situations. Globalisation and the impact of changing factors in the business environment on working practices has meant that employees can't rely on others and often have to make their own critical decisions. In this unit learners examine the benefits of critical thinking skills for both the individual and the organisation. They will explore different techniques which can be used to develop analytical and problem-solving skills for making judgements and decision making, and conduct their own self-analysis.

One practical aspect of this is carrying out risk assessments. Before tasks are carried out managers and employees should assess the risks. Learners will have the opportunity to use a model for understanding and developing critical thinking and, through recognising assumptions, evaluating arguments and drawing conclusions, they will practise these skills by applying them to different situations.

On completion of the unit, learners will be able to evaluate the validity of the reference material they have used.

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 Know the value of critical thinking skills	1.1 Define critical thinking skills 1.2 Describe the benefits of using critical thinking skills in the workplace
2 Understand how to think critically	2.1 Assess barriers to critical thinking 2.2 Explain how using critical thinking techniques helps inform decision making 2.3 Assess own critical thinking skills
3 Be able to develop own critical thinking skills	3.1 Evaluate an issue using critical thinking techniques 3.2 Justify own conclusions drawn from interpretation of information 3.3 Analyse impact of bias and preference used

Unit content

1 Know the value of critical thinking skills

Critical thinking skills: definition eg identifying, analysing, reasoning, and evaluating arguments; an argument includes a position or point of view, an attempt to persuade others to accept the point of view, reasons given to support the point of view; formulate and present convincing reasons in support of conclusions; make reasonable and intelligent decisions; overcoming personal prejudice and bias; need for critical thinking skills in decision making

Benefits to the workplace: improved analysis and problem-solving skills; having an open mind to change; better understanding of others' decisions; being creative; having better job knowledge; evaluating the quality of information presented; potential to progress within the organisation

2 Understand how to think critically

Barriers to critical thinking: bias, prejudice, wishful thinking, egocentrism, fear of change, making assumptions

Techniques: applying the key components of critical thinking eg recognising assumptions, evaluating arguments, drawing conclusions; helps inform decision making

Self-assessment: identify own characteristics eg open minded, honesty, welcoming criticism, taking initiative, confronting problems, independent thinking, not afraid to disagree, basing beliefs on facts and evidence

3 Be able to develop own critical thinking skills

Validating sources of information: consider the following questions about the source material who was it written or said by, why was it written or said, when was it written or said.

Objectivity: looking at the evidence and not showing bias or preference; able to highlight persuasive language

Assessing situations: identify the risks; evaluate the risks; make an informed decision

Essential guidance for tutors

Delivery

This unit could be delivered as a discrete unit or as part of the learner's overall studies. The content of the unit should be delivered using as many real and practical examples as possible.

For learning outcome 1, tutors could lead a discussion on what is meant by critical thinking and how it differs from creative thinking, leading on to an agreed definition of what skills are involved. Working in pairs, learners could discuss situations when they have used these skills, giving reasons to justify why. Learners could 'thought shower' reasons why employers want staff with critical thinking skills and list them as evidence. A speaker could discuss how their organisation benefits from staff who use critical thinking skills, and how these skills are developed in training programmes.

For learning outcome 2, tutors could raise awareness and recognition of barriers to critical thinking and where these situations could occur through a tutor-led discussion. Group activities could involve debates and discussions with one group observing the other and noting the argument and persuasive language used. A group discussion could establish the skills of a critical thinker and learners could then conduct their own self-assessment of these skills, in order to identify areas for development and improvement.

For learning outcome 2, the *Pearson's RED* critical thinking model could be used to introduce critical thinking principles for learners to apply when faced with a decision. This includes; recognise assumptions (separating fact from opinion); evaluate arguments (analysing information objectively and accurately, questioning the quality of supporting evidence, and understanding how emotion influences the situation); and draw conclusions (bringing diverse information together to arrive at conclusions that logically follow from the available evidence). Learners could apply this model when developing their critical thinking skills through using case study exercises and role play based on on-the-job problems and issues. This can be developed for learning outcome 3, where learners could discuss their conclusions and how they dealt with any preferences or bias encountered. The importance of validating sources of information can be evidenced through group research activities on a specific topic followed by discussion on the reliability and validity of that information. Carrying out risk assessments for tasks within the workplace or on trips will give learners a practical context for applying their critical thinking skills.

Assessment

The assessment for this unit could include learner's written work and tapes, either video and/or audio. All assessment material needs to be kept for both internal and external quality assurance assessment. The assessment criteria for each learning outcome can be assessed together or individually. The assessment could also come from assessment material in other units. It is essential that the evidence for each part is recorded.

To achieve 1.1 learners must give details about what critical thinking involves. This does not need to be an in-depth account of the process.

For 1.2, learners must describe at least three workplace benefits of staff using critical thinking skills. This can be supported with examples.

To meet 2.1, learners must give details of at least three barriers to critical thinking, drawing on examples, preferably from their own experiences, to illustrate how this has impacted on the situation.

For 2.2, learners must explain how using critical thinking techniques helps inform decision making. They should detail the process using a suitable model, for example *Pearson's RED* model, and apply this to two different workplace scenarios where decisions were needed. Evidence used can be from the learner's own experience or from case studies.

For 2.3, learners can use a checklist to rate their own critical thinking characteristics and skills. They should provide a brief commentary to support their reasoning for the rating.

To achieve 3.1, 3.2 and 3.3 learners could use the evidence for 2.2 to develop their own critical thinking skills or use another scenario such as a risk assessment. They must evaluate an issue using suitable techniques, then consider how they validated the information in order to justify the conclusion. Any bias or preference must be analysed. This evidence may be videoed or provided in the form of a witness statement by the tutor.

Essential resources

There are no essential resources for this unit.

Indicative resource materials

Brink-Budgen R – *Critical Thinking for Students: Learn the Skills of Analysing, Evaluating and Producing Arguments* (How To Books Ltd 4th Ed, 2010) ISBN 1845283864

Websites

The Open University	www.open.ac.uk/skillsforstudy
Large variety of resources and video clips	www.TES.co.uk
Pearson's RED model for critical thinking	www.talentlens.com

Unit 22: Academic Research Skills

Unit code:	D/503/2912
QCF Level 3:	BTEC Specialist
Credit value:	2
Guided learning hours:	15

Unit aim

The aim of this unit is to give learners the skills and knowledge to carry out their own research, using a variety of research methods.

Unit introduction

This unit could be delivered on its own or as part of the learner's work for other units. The unit introduces learners to a variety of research methods including qualitative and quantitative methods. The unit highlights the advantages and disadvantages of these different methods and learners will have the opportunity to use a variety of methods in their own research.

Learners will look at how to integrate references into their research and their own research methods as well as the results of their research.

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 research for a study topic	1.1 Explain appropriateness of types of research methodologies for a study topic 1.2 Compare the appropriateness of using primary and secondary research for a study topic
2 Be able to implement research of relevant topic	2.1 Produce a research plan which is relevant for a study topic 2.2 Collect data using appropriate methods 2.3 Analyse data to support requirements of the study topic
3 Be able to evaluate research conclusions	3.1 Use suitable research evaluation techniques to make conclusions 3.2 Integrate an appropriate referencing system in final write up 3.3 Assess the suitability of the methodology used for the study topic 3.4 Make recommendations to improve future research

Unit content

1 **Understand how to research for a study topic**

Types of research: types eg questionnaires, surveys; qualitative research techniques, qualitative research techniques, observation, interviews, case studies, primary research–qualitative and quantitative, secondary research–qualitative and quantitative; types of sampling, random, cluster, stratified

2 **Be able to implement research of relevant topic**

Research plan: timetable; aims and objective of the research; research topic or hypotheses; resources; methodology; costs, ethical considerations

Data collection and analysis: selection of appropriate tools for data collection; qualitative and quantitative data analysis – interpreting transcripts; coding techniques; specialist software; statistical tables; comparison of variable; trends; forecasting

3 **Be able to evaluate research conclusions**

Research findings: collate findings; interpret data; final document eg report; make conclusions

Evaluation of research: reflection on research; validity of research

Referencing system: need for a referencing system; references and/ or bibliography; integrating references into the text

Essential guidance for tutors

Delivery

This unit could be delivered as a discrete unit or as part of the learner's overall studies. Learners for this unit could be engaged in on-the-job training or attending a training centre.

The area of research should be derived from the learner's vocational interest and, if possible, should form an integral part of their evidence.

To introduce the unit tutors could lead a group discussion on the importance of learners developing their study skills through researching information and using techniques to analyse and evaluate data.

For learners to understand the difference between primary and secondary research simple questionnaires could be devised, tested and evaluated among the group. To introduce secondary research, the tutor could provide examples of internal and external data sources.

It is important for learners to be aware of the difference between qualitative and quantitative data and it will be useful if learners are given examples from a case study. An exercise could look at the differences between primary and secondary research, the main methods, advantages and disadvantages of each, how appropriate they are, and whether they produce mainly quantitative or qualitative data. Learners should have access to both paper-based and internet-based sources of secondary information.

When planning research for the assignment activity the choice of study topic is important. Learners can 'thought shower' ideas for suitable topics then devise appropriate aims and objectives for their research.

Using information and communication technology to collect and analyse information is an important approach and should be emphasised. Exercises to gather data for purchasing products or services, such as smartphones or tickets for an event, can be used to demonstrate the importance of selecting relevant data to meet the aims and objectives of the research, and the issues associated with information overload.

For learning outcome 3, learners should examine ways of referencing their research, using acknowledgements which should include the author's name, year or date of publication, the title of the book, article, report etc., the place of publication and the publisher. Bibliographies that list all texts that have informed the writing but have not been directly quoted within the research itself should come at the end of the essay, listing each text alphabetically stating the author and date of publication and publisher.

The analysis of learners' own questionnaires may be a useful activity as the limitations and pitfalls of learners' own research can be used in discussion to identify the range of possible pitfalls. Producing individual reports on their research topics can allow learners to benefit from constructive criticism from their peers and see scope to improve their assessed assignment.

Assessment

The evidence for this unit will include either a detailed piece of research for the vocational area or a piece of research of interest to the learner. The research could be a group activity provided the individual learner has a detailed record showing that they have met all the assessment criteria.

To achieve 1.1 learners must explain the suitability of at least two quantitative and two qualitative research techniques, relating this to a specific study topic.

For 1.2, learners can develop the evidence used for 1.1. They must support their choice of using primary or secondary research for the study topic.

To meet 2.1, evidence should include a detailed research plan with aims and objectives of the research.

For 2.2, learners must choose a suitable method of data collection, then interpret the findings from their own research for 2.3.

To achieve 3.1 and 3.2 learners must present their research findings in a suitable format drawing a conclusion and using appropriate referencing.

For 3.3 and 3.4, learners should analyse their own research findings and the effectiveness of the methods used, including data collection methods. This will enable them to make recommendations for improvements to their future research methodologies based on their findings.

Essential resources

There are no essential resources for this unit.

Indicative resource materials

Copus J – *Brilliant Writing Tips for Students* (Palgrave Macmillan, 2009) ISBN 9780230220027

Saunders M, Lewis P and Thornhill A – *Research Methods for Business Students* (FT/Prentice Hall, 2009) ISBN 9780273716860

Williams K, Carroll J – *Referencing and Understanding Plagiarism* (Palgrave Macmillan, 2009) ISBN 9780230574793

Websites

Study skills resources	http://www.bized.co.uk/reference/studyskills/index.htm
WisegEEK-clear answers for common questions	http://www.wisegEEK.com/what-is-the-difference-between-quantitative-and-qualitative-research.htm
YouTube	www.youtube.com

Unit 23: Planning for Further Learning Development

Unit code:	H/503/2913
QCF Level 3:	BTEC Specialist
Credit value:	2
Guided learning hours:	15

Unit aim

The aim of this unit is to give learners the understanding and skills required to plan and assess learning development needed to achieve educational goals.

Unit introduction

In order for learners to take control of their learning, monitor their progress, and identify the opportunities available to help them achieve goals, they will need to plan and record this development.

Learners will explore the skills and knowledge required for learning development, before identifying their own strengths and needs. This will allow them to examine their own learning development needs, and research ways to meet them to inform the structure of a learning development plan.

On completion of this unit, learners will reflect on what and how they have learned, assessing what went well and what was less effective. They will understand how to access opportunities to help achieve educational goals, which in turn will improve their competency and enhance their career progression.

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 Be able to identify strengths and needs in own learning	1.1 Outline own goals for further learning and education 1.2 Conduct a learning and skills audit to identify strengths and needs in own learning
2 Understand opportunities for further learning development	2.1 Outline the types of further learning opportunities available 2.2 Assess the suitability of opportunities available for own further learning development
3 Be able to plan own further learning development	3.1 Prepare a learning development plan which includes developments needed to meet learning goals 3.2 Record learning achievements against planned goals 3.3 Assess learning achievements against planned goals

Unit content

1 **Be able to identify strengths and needs in own learning**

Skills and learning requirements: future work and learning; new skills, competences, learning, education and qualifications required, types of assessment to be undertaken, preferred learning styles, study skills gaps

Learning goals: specific, measurable, achievable, realistic, time-bound (SMART); related to organisation of time, resources, work, personal life commitments; related to success criteria for learning and achievement

Analysis of own skills: methods eg use strengths and weaknesses analysis tool, SWOT analysis, reflect on past performance and achievements, consider feedback from tutors, supervisors, mentors

2 **Understand opportunities for further learning**

Learning opportunities: learning development and education activities match identified goals eg in-house workplace training programmes, learning zones within organisations, induction, mentoring, coaching, job rotation, volunteering schemes; external courses eg accredited qualifications, residentials, skills development, study programmes, work placements, taster sessions

3 **Be able to plan own further learning development**

Learning development plan: objectives eg reflect own needs, skills and experiences; reflect identified needs for current or aspirational job role; support needed to achieve ; goals are achievable, time constrained, realistic; agree plan with line manager or tutor

Learning achievements: measuring success eg qualification aims, learning aims, assessment outcomes, confidence; appropriateness of learning, expectations, whether other/additional learning is required

Reflection on learning: recording achievements eg describing the experience, what was done, what was learned, how this was learned, and how it felt; reflect on the experience, what went well, what went less well, what might be done differently another time, how learning could be improved; how goals would change; assess outcomes of learning eg positive experiences, lessons learned

Essential guidance for tutors

Delivery

The emphasis of this unit is on helping learners to focus on their own learning requirements in relation to their educational goals. A mixture of tutor-led input and individual learner reflection is therefore required.

To introduce the unit, learners could thought shower the qualities and skills that they think employers look for in an employee.

An employer could be invited to talk about the individual learning development programme in their organisation and the preparation required. Learners could prepare questions about the benefits to an organisation of supporting the learning development of their employees. Learners could discuss the benefits to the individual of continuing professional development considering how a current role may be enhanced by improving job or study satisfaction and increasing opportunities for progression within the organisation. Tutors could also introduce the concept of lifelong learning.

The need to complete a personal audit of skills, qualities and experience before starting to plan for learning development could be explored through discussion. The tutor should emphasise the importance of ensuring self-assessment focuses on the job role and person specification for the job or course. Learners could research different self-assessment tools using internet sources and present their findings to the group. They could discuss the advantages and disadvantages of the different tools. Learners at this level should be able to identify their own strengths and needs in relation to their work role autonomously.

For learning outcome 2, learners could work in small groups to investigate the learning development opportunities provided by different organisations through examining organisational statements. Learners could work in groups to analyse case studies of individuals to consider how they may benefit from different professional development opportunities. This will help learners understand how the individual could enhance their skills through the different opportunities. Learners need to work independently to consider their own opportunities for development in relation to their identified educational needs, their work role, the organisation's goals, opportunities provided by the organisation and external courses. They will also need to consider how learning will be accredited.

Learners could analyse examples of learning development plans to consider different ways to present plans. Learners could work in groups to compile a format for a learning development plan to include an audit, targets and an action plan. The need for plans to be SMART (specific, measurable, achievable, realistic and time-bound) and agreed by the line manager or tutor could be discussed by learners. Learners could be encouraged to keep learning logs to support preparation of the review and ongoing target setting process.

Assessment

Evidence for all assessment criteria could be provided in a learning development plan using a template.

For 1.1, learners need to give clear details of at least three goals for their own learning and education. Reference may be made to a current or future career plan/job description.

For 1.2, learners need to give details of the strengths they have that match the requirements for learning. Learners will need to provide evidence of using at least two self-analysis tools or techniques, for example a SWOT analysis referenced to the job or course description. They must give brief details of at least two learning requirements they plan to develop in order to meet their educational needs.

For 2.1 and 2.2, learners must give clear information covering at least two different opportunities that may be available to develop their learning and enable them to meet their educational goals. Learners need to assess the suitability of both opportunities either within an organisation or external opportunities.

For 3.1, 3.2 and 3.3, learners need to set targets and develop an action plan for their learning development. The targets identified need to be relevant to the strengths and needs identified in 1.2, appropriate to their own educational needs and be SMART (specific, measurable, achievable, realistic and time-bound). The targets and action plan must be agreed with the line manager or tutor and reviewed to track progress against the planned goals.

Links to other BTEC units, other BTEC qualifications and other relevant units and qualifications

This unit forms part of the *WorkSkills from Edexcel* suite. This unit has particular links with:

Level 2 WorkSkills	Level 3 WorkSkills
Unit 8: Self-management Skills	Unit 1: Career Development
Unit 9: Self-assessment	Unit 11: Reviewing Professional Development
Unit 22: Setting and Meeting Targets at Work	Unit 17: Managing a Work-life Balance

Essential resources

There are no essential resources for this unit.

Indicative reading

Dent F – *The Self Managed Development Pocketbook* (Management Pocketbooks, 2006 revision) ISBN 1870471660

Meggison D – *Continuing Professional Development, 2nd edition* (Chartered Institute of Personnel and Development, 2007) ISBN 1843981661

Websites

SMART targets

www.projectsmart.co.uk/use-smart-objectives-to-focus-goals-plans-and-performance.html

SWOT analysis method and template

www.businessballs.com/swotanalysisfreetemplate.htm

an online interactive system designed to help individuals manage their own learning, career and personal development

www.myprogressfile.com

Unit 24: Manage Own Learning

Unit code:	R/602/4557
QCF Level 3:	BTEC Specialist
Credit value:	1
Guided learning hours:	10

Unit aim

The aim of this unit is to enable learners to organise and prepare their learning and to reflect on what they have done.

Unit introduction

In this unit learners will develop skills within the personal, learning and thinking skills (PLTS) framework and therefore can be assessed in conjunction with other units that they are studying. The focus of the unit is on processes as well as outcomes. Being conscious of the process skills they need as they carry out an activity will help learners focus on how they should apply or improve their skills. This unit could be delivered over the length of the course, giving learners the opportunity to develop their skills.

The areas in the PLTS framework covered in this unit are self-managers and reflective learners.

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 Be able to organise and manage own learning goals	1.1 Analyse own skills and learning requirements 1.2 Set SMART learning goals to enable learning to be completed on time and to a high standard 1.3 Plan responses to risks to learning not being completed on time 1.4 Set goals to manage commitments in work and personal life 1.5 Maintain relationships with peers supporting others to achieve success in learning 1.6 Complete learning tasks on time and to the required standard
2 Be able to reflect on own learning	2.1 Evaluate learning goals against success criteria 2.2 Devise constructive actions in response to feedback from others 2.3 Revise learning goals to respond to outcomes of reflection 2.4 Discuss outcomes of learning experiences with others

Unit content

1 **Be able to organise and manage own learning goals**

Skills and learning requirements: future work and learning; new skills, competences, learning and qualifications required, types of assessment to be undertaken, preferred learning styles, study skills gaps

Learning goals: specific, measurable, achievable, realistic, time-bound (SMART); related to organisation of time, resources, work, personal life commitments; related to success criteria for learning and achievement

Time management: punctuality and meeting deadlines, managing work, learning and personal commitments

Managing risks: conflicting priorities, motivation, skills gaps

Building relationships: showing respect for others' ideas and opinions; listening to others, working with others in learning, managing work, and personal life

2 **Be able to reflect on own learning**

Success: eg qualification aims, learning aims, assessment outcomes, confidence; appropriateness of learning, expectations, whether other/additional learning is required

Accepting feedback: listening to others' comments whether positive or negative and using the comments to amend targets

Reflection on learning: describing the experience, what was done, what was learned, how this was learned, and how it felt; reflect on the experience, what went well, what went less well, what might be done differently another time, how skills could be improved; how goals would change

Outcomes of learning: positive experiences, lessons learned

Essential guidance for tutors

Delivery

Tutors will need to take a flexible approach when delivering the content of this unit, as learners could be engaged in full-time study or on-the-job training. The unit could be delivered alongside an experiential unit from another programme to enable learners to plan their work and measure achievement. At this level, learners are expected to show skills in managing their own learning and relating positively with others. Learners should be encouraged to act with autonomy. They need to be able to analyse and evaluate outcomes and support others as they respond to challenges.

The emphasis in this unit is on developing learners' skills and helping them to understand the processes used to enable better self-organisation and to reflect on their learning. The content of the unit could be delivered through one-to-one tutorials and could also be embedded in other units.

Assessment

Assessment for this unit could include written work and video and/or audio tapes. All assessment material needs to be kept for both internal and external quality assurance. The assessment is likely to be a portfolio of evidence or a logbook which records learning goals and achievements as learners progress through a programme of learning. This evidence could form part of a wider portfolio, provided it is explicit enough for assessment of this unit.

Indicative resource materials

Websites

www.ehow.com	Useful site including information on carrying out and writing up peer reviews
www.managingtimeeffectively.com/	Useful information and ideas on time management
www.mindtools.co.uk	A variety of team leadership and management resources
www.practicebasedlearning.org/	Ideas and resources for learning in the workplace

PLTS performance mapping

Reflective learners	Assessment criterion
Assess themselves and others, identifying opportunities and achievements	2.1
Set goals with success criteria for their development and work	2.1
Review progress, acting on the outcomes	2.1
Invite feedback and deal positively with praise, setbacks and criticism	2.2
Evaluate experiences and learning to inform future progress	2.1/2.3
Communicate their learning in relevant ways for different audiences	2.4
Self-managers	Assessment criterion
Seek out challenges or new responsibilities and show flexibility when priorities change	1.1
Work towards goals, showing initiative, commitment and perseverance	1.6
Organise time and resources, prioritising actions	1.6
Anticipate, take and manage risks	1.3
Deal with competing pressures, including personal and work-related demands	1.4
Respond positively to change, seeking advice and support when needed	2.2
Manage their emotions, and build and maintain relationships	1.5

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.edexcel.com).

Useful publications

Related information and publications include:

- *Guidance for Centres Offering Edexcel/BTEC QCF Accredited Programmes* (Edexcel, 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 Edexcel publications catalogue and update catalogue.

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

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- 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

The Edexcel/BTEC qualification framework for MySkills

Progression opportunities within the framework.

Level	General qualifications	BTEC full vocationally-related qualifications	BTEC specialist courses	NVQ/occupational
4				
3			Edexcel BTEC Level 3 Award and Certificate in WorkSkills (QCF)	
2			Edexcel BTEC Level 2 Award, Certificate, Extended Certificate and Diploma in WorkSkills (QCF) Edexcel BTEC Level 2 Award and Certificate in Employability Skills (QCF) Edexcel BTEC Level 2 Certificate in Science, Technology, Engineering and Mathematics Leadership Skills (QCF)	

Level	General qualifications	BTEC full vocationally-related qualifications	BTEC specialist courses	NVQ/occupational
1			<p>Edexcel BTEC Level 1 Award, Certificate, Extended Certificate and Diploma in WorkSkills (QCF)</p> <p>Edexcel BTEC Level 1 Certificate in Science, Technology, Engineering and Mathematics Leadership Skills (QCF)</p>	
Entry			Edexcel BTEC Entry 3 Award and Certificate in WorkSkills (QCF)	

Annexe B

Wider curriculum mapping

Study of Edexcel BTEC Level 3 qualifications gives 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

Glossary of Accreditation Terminology

The following information about these qualifications can also be found on the Edexcel website – see: 'Accreditation Information' (link).

Accreditation start/end date	The first/last dates that Edexcel can register learners for a qualification.
Certification end date	The last date on which a certificate may be issued by Edexcel.
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 (GLH)	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.
Learning Aims Database	Link to the Learning Aims Database, which features detailed funding information by specific learning aim reference.
Learning Aim Reference	Unique reference number given to the qualification by the funding authorities on accreditation.
Level	The level at which the qualification is positioned in the Qualifications and Credit Framework (QCF).
Performance tables	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.
Qualifications Number (QN)	Unique reference number given to the qualification by the regulatory authorities on accreditation.
Register of Regulated Qualifications	Link to the entry on the Register of Regulated Qualifications for a particular qualification. This database features detailed accreditation information for the particular qualification.

Section 96	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.
Title	The accredited title of the qualification.
UCAS points	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 D

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
BTEC Level 7 Advanced Professional Qualifications BTEC Advanced Professional Award, Certificate and Diploma	7	BTEC Level 7 Professional Qualifications BTEC Level 7 Award, Certificate, Extended Certificate and Diploma	
BTEC Level 6 Professional Qualifications BTEC Professional Award, Certificate and Diploma	6	BTEC Level 6 Professional Qualifications BTEC Level 6 Award, Certificate, Extended Certificate and Diploma	
BTEC Level 5 Professional Qualifications BTEC Professional Award, Certificate and Diploma	5	BTEC Level 5 Professional Qualifications BTEC Level 5 Award, Certificate, Extended Certificate and Diploma	BTEC Level 5 Higher Nationals BTEC Level 5 HND Diploma
BTEC Level 4 Professional Qualifications BTEC Professional Award, Certificate and Diploma	4	BTEC Level 4 Professional Qualifications BTEC Level 4 Award, Certificate, Extended Certificate and Diploma	BTEC Level 4 Higher Nationals BTEC Level 4 HNC Diploma
BTEC Level 3 Qualifications BTEC Award, Certificate, Extended Certificate and Diploma	3	BTEC Level 3 Specialist Qualifications BTEC Level 3 Award, Certificate, Extended Certificate and Diploma	BTEC Level 3 Nationals BTEC Level 3 Certificate, Subsidiary Diploma, Diploma and Extended Diploma

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

QCF qualification sizes	
Award	1-12 credits
Certificate	13-36 credits
Diploma	37+ credits

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For more information on Edexcel and BTEC qualifications please
visit our website: www.edexcel.com

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