

Pearson BTEC  
Level 2 Subsidiary Award, Award, Extended Award,  
Foundation Certificate and Certificate in  
**Workskills**

# Specification for Wales

*First registration from August 2021*

Level 2 Subsidiary Award, Award, Extended Award and Certificate in Workskills

*First registration from April 2025*

BTEC Level 2 Foundation Certificate in Workskills (for Wales).

L2

Issue 1



# **Pearson BTEC Level 2 Subsidiary Award, Award, Extended Award and Certificate in Workskills**

## **Specification for Wales**

BTEC Specialist qualification

First registration for Subsidiary Award, Award, Extended Award and Certificate: August 2021

First registration for Foundation Certificate: April 2025

Issue 1

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# Contents

<b>1</b>	<b>Introducing the qualifications</b>	<b>1</b>
	What are BTEC Specialist qualifications?	1
	Qualification purposes	1
	Funding	2
<b>2</b>	<b>Qualification summary and key information</b>	<b>3</b>
<b>3</b>	<b>Qualification structures</b>	<b>6</b>
	Pearson BTEC Level 2 Subsidiary Award in Workskills	6
	Pearson BTEC Level 2 Award in Workskills	7
	Pearson BTEC Level 2 Extended Award in Workskills	8
	Pearson BTEC Level 2 Foundation Certificate in Workskills	9
	Pearson BTEC Level 2 Certificate in Workskills	10
<b>4</b>	<b>Assessment requirements</b>	<b>11</b>
	Language of assessment	11
	Internal assessment	11
	Assessment of units	12
<b>5</b>	<b>Centre recognition and approval</b>	<b>13</b>
	Approvals agreement	13
	Centre resource requirements	13
<b>6</b>	<b>Access to qualifications</b>	<b>14</b>
	Reasonable adjustments and special consideration	14
<b>7</b>	<b>Recognising prior learning and achievement</b>	<b>15</b>
<b>8</b>	<b>Quality assurance of centres</b>	<b>16</b>
<b>9</b>	<b>Units</b>	<b>17</b>
	Unit 1: Developing Work-related Skills and Behaviours	18
	Unit 2: Developing Job Application Skills	31
	Unit 3: Understanding Types of Employment Contract	44
	Unit 4: Developing Interview Skills	56
	Unit 5: Celebrating Equality and Diversity in the Workplace	70

Unit 6:	Understanding Work-based Rights and Responsibilities	83
Unit 7:	Planning for Career Entry and Progression	95
Unit 8:	Applying Literacy in the Workplace	107
Unit 9:	Applying Numeracy in the Workplace	120
Unit 10:	Planning the Use of Digital Products and Services in the Workplace	133
Unit 11:	Using IT to Manage Information at Work	144
Unit 12:	Assessing and Managing Risk in the Workplace	156
Unit 13:	Working as Part of a Team	171
Unit 14:	Anticipating and Meeting Customer Needs and Expectations	183
Unit 15:	Managing Work-related Problems	196
Unit 16:	Planning for and Learning from Work Experience	209
Unit 17:	Encouraging Environmental Awareness in the Workplace	223
Unit 18:	Being Entrepreneurial	237
<b>10</b>	<b>Appeals</b>	<b>252</b>
<b>11</b>	<b>Malpractice</b>	<b>253</b>
	Dealing with malpractice in assessment	253
<b>12</b>	<b>Further information and publications</b>	<b>256</b>
<b>13</b>	<b>Glossary</b>	<b>257</b>
	Part A – General terminology used in specification	257
	Part B – Terms used in knowledge and understanding criteria	258

# 1 Introducing the qualifications

## What are BTEC Specialist qualifications?

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BTEC Specialist qualifications are work-related qualifications available from Entry to Level 3. The qualifications put learning into the context of the world of work, giving students the opportunity to apply their research, skills and knowledge in relevant and realistic work contexts. This applied, practical approach means learners build the knowledge, understanding and skills they need for career progression or further study.

## Qualification purposes

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The Pearson BTEC Workskills suite at Entry, Level 1, and Level 2 has been designed to reflect and support the employability stage of each learner. Each level and size have been designed to enable centres to create a flexible programme that develops a learner's skills and replicates their intended outcome/destination. The qualifications also enable the development of discrete skills, such as applying for job vacancies, developing interview techniques and working within teams. The qualifications encourage learners to develop the ability to combine skills and units to give a realistic learning experience that emulates the 21st century workplace.

The Pearson BTEC Level 2 Awards/ Certificate in Workskills are for learners who need to develop their skills and knowledge of employability to access the job market.

The Pearson BTEC Level 2 in Workskills enables learners to:

- develop skills valued by employers and are in demand in the workplace
- develop knowledge related to employability and the workplace
- embrace the 21<sup>st</sup> century workplace and build a career plan
- achieve a nationally recognised Level 2 qualification that prepares them for employment or self-employment
- develop self-awareness of skills and knowledge and the ability to continually upskill to meet the changing demands of the workplace

The Pearson BTEC Level 2 Subsidiary Award in Workskills enables learners to:

- select an appropriate unit to address their personal skill or knowledge gaps. It is suitable for learners both entering or re-entering the job market and should be delivered as a short course.

The Pearson BTEC Level 2 Award in Workskills enables learners to:

- access 2 areas of learning, e.g. job applications and interview techniques. It should be delivered as a personalised focused part-time or complimentary learning programme to address specific knowledge or skills gaps.

The Pearson BTEC Level 2 Extended Award in Workskills enables learners to:

- access 2 areas of learning, e.g. job applications and interview techniques. It should be delivered as a personalised focused part-time or complimentary learning programme to address specific knowledge or skills gaps.

The Pearson BTEC Level 2 Foundation Certificate in Workskills:

- enables learners to access a range of employability skills and knowledge. This size will suit full-time programmes and compliment other areas such as personal growth and wellbeing and vocational learning. The choice of units will depend on the individual needs, skill levels and desired progression outcomes.
- **is only available for delivery in Wales and has been designed to meet the Welsh Government policy on school performance measurement. If you have any queries on how qualifications contribute towards performance measures, including GCSE/A level equivalency values, performance points or discount codes, please contact [ims@gov.wales](mailto:ims@gov.wales)**

The Pearson BTEC Level 2 Certificate in Workskills enables learners to:

- develop understanding and accessing a range of employability skills and knowledge. This size will suit full-time programmes and compliment other areas such and personal growth and wellbeing and vocational learning. The choice of units will depend on the individual needs, skill levels and desired progression outcomes.

## Funding

Qualifications eligible and funded for post-16-year-olds can be found on the funding Hub.

## 2 Qualification summary and key information

Qualification title	Pearson BTEC Level 2 Subsidiary Award in Workskills
Qualification Wales Approval/Designation Number	C00/4431/3
Regulation start date	01/08/2021
Operational start date	01/08/2021
Approved age ranges	14–16 16–18 18+ 19+
Total qualification time (TQT)	35
Guided learning hours (GLH)	35
Assessment	Internal assessment.
Grading information	The qualification and units are graded Pass/Fail.

Qualification title	Pearson BTEC Level 2 Award in Workskills
Qualification Wales Approval/Designation Number	C00/4431/4
Regulation start date	01/08/2021
Operational start date	01/08/2021
Approved age ranges	14–16 16–18 18+ 19+
Total qualification time (TQT)	70
Guided learning hours (GLH)	70
Assessment	Internal assessment.
Grading information	The qualification and units are graded Pass/Fail

<b>Qualification title</b>	<b>Pearson BTEC Level 2 Extended Award in Workskills</b>
Qualification Wales Approval/Designation Number	C00/4431/5
Regulation start date	01/08/2021
Operational start date	01/08/2021
Approved age ranges	14-16 16-18 18+ 19+
Total qualification time (TQT)	105
Guided learning hours (GLH)	105
Assessment	Internal assessment.
Grading information	The qualification and units are graded Pass/Fail.

<b>Qualification title</b>	<b>Pearson BTEC Level 2 Foundation Certificate in Workskills</b>
Qualification Wales Approval/Designation Number	C00/5166/2
Regulation start date	10/04/2025
Operational start date	01/4/2025
Approved age ranges	14-16 16-18 18+ 19+
Total qualification time (TQT)	140
Guided learning hours (GLH)	140
Assessment	Internal assessment.
Grading information	The qualification and units are graded Pass/Fail.

<b>Qualification title</b>	<b>Pearson BTEC Level 2 Certificate in Workskills</b>
Qualification Wales Approval/Designation Number	C00/4431/6
Regulation start date	01/08/2021
Operational start date	01/08/2021
Approved age ranges	14-16 16-18 18+ 19+
Total qualification time (TQT)	210
Guided learning hours (GLH)	210
Assessment	Internal assessment.
Grading information	The qualification and units are graded Pass/Fail.

### 3 Qualification structures

#### Pearson BTEC Level 2 Subsidiary Award in Workskills

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

Unit number	Units Learners must take one of the following optional units	Level	Guided learning hours
1	Developing Work-related Skills and Behaviours	L2	35
2	Developing Job Application Skills	L2	35
3	Understanding Types of Employment Contract	L2	35
4	Developing Interview Skills	L2	35
5	Celebrating Equality and Diversity in the Workplace	L2	35
6	Understanding Work-based Rights and Responsibilities	L2	35
7	Planning for Career Entry and Progression	L2	35
8	Applying Literacy in the Workplace	L2	35
9	Applying Numeracy in the Workplace	L2	35
10	Planning the Use of Digital Products and Services in the Workplace	L2	35
11	Using IT to Manage Information at Work	L2	35
12	Assessing and Managing Risk in the Workplace	L2	35
13	Working as Part of a Team	L2	35
14	Anticipating and Meeting Customer Needs and Expectations	L2	35
15	Managing Work-related Problems	L2	35
16	Planning for and Learning from Work Experience	L2	35
17	Encouraging Environmental Awareness in the Workplace	L2	35
18	Being Entrepreneurial	L2	35

## Pearson BTEC Level 2 Award in Workskills

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

Unit number	Units Learners must take two units from below the choice of units must have a clear purpose and outcome matched to the learners needs	Level	Guided learning hours
1	Developing Work-related Skills and Behaviours	L2	35
2	Developing Job Application Skills	L2	35
3	Understanding Types of Employment Contract	L2	35
4	Developing Interview Skills	L2	35
5	Celebrating Equality and Diversity in the Workplace	L2	35
6	Understanding Work-based Rights and Responsibilities	L2	35
7	Planning for Career Entry and Progression	L2	35
8	Applying Literacy in the Workplace	L2	35
9	Applying Numeracy in the Workplace	L2	35
10	Planning the Use of Digital Products and Services in the Workplace	L2	35
11	Using IT to Manage Information at Work	L2	35
12	Assessing and Managing Risk in the Workplace	L2	35
13	Working as Part of a Team	L2	35
14	Anticipating and Meeting Customer Needs and Expectations	L2	35
15	Managing Work-related Problems	L2	35
16	Planning for and Learning from Work Experience	L2	35
17	Encouraging Environmental Awareness in the Workplace	L2	35
18	Being Entrepreneurial	L2	35

## Pearson BTEC Level 2 Extended Award in Workskills

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

Unit number	Units Learners must take three of the following optional units	Level	Guided learning hours
1	Developing Work-related Skills and Behaviours	L2	35
2	Developing Job Application Skills	L2	35
3	Understanding Types of Employment Contract	L2	35
4	Developing Interview Skills	L2	35
5	Celebrating Equality and Diversity in the Workplace	L2	35
6	Understanding Work-based Rights and Responsibilities	L2	35
7	Planning for Career Entry and Progression	L2	35
8	Applying Literacy in the Workplace	L2	35
9	Applying Numeracy in the Workplace	L2	35
10	Planning the Use of Digital Products and Services in the Workplace	L2	35
11	Using IT to Manage Information at Work	L2	35
12	Assessing and Managing Risk in the Workplace	L2	35
13	Working as Part of a Team	L2	35
14	Anticipating and Meeting Customer Needs and Expectations	L2	35
15	Managing Work-related Problems	L2	35
16	Planning for and Learning from Work Experience	L2	35
17	Encouraging Environmental Awareness in the Workplace	L2	35
18	Being Entrepreneurial	L2	35

## Pearson BTEC Level 2 Foundation Certificate in Workskills

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

Unit number	Units Learners must take four of the following optional units	Level	Guided learning hours
1	Developing Work-related Skills and Behaviours	L2	35
2	Developing Job Application Skills	L2	35
3	Understanding Types of Employment Contract	L2	35
4	Developing Interview Skills	L2	35
5	Celebrating Equality and Diversity in the Workplace	L2	35
6	Understanding Work-based Rights and Responsibilities	L2	35
7	Planning for Career Entry and Progression	L2	35
8	Applying Literacy in the Workplace	L2	35
9	Applying Numeracy in the Workplace	L2	35
10	Planning the Use of Digital Products and Services in the Workplace	L2	35
11	Using IT to Manage Information at Work	L2	35
12	Assessing and Managing Risk in the Workplace	L2	35
13	Working as Part of a Team	L2	35
14	Anticipating and Meeting Customer Needs and Expectations	L2	35
15	Managing Work-related Problems	L2	35
16	Planning for and Learning from Work Experience	L2	35
17	Encouraging Environmental Awareness in the Workplace	L2	35
18	Being Entrepreneurial	L2	35

## Pearson BTEC Level 2 Certificate in Workskills

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

Unit number	Units Learners must take six of the following optional units	Level	Guided learning hours
1	Developing Work-related Skills and Behaviours	L2	35
2	Developing Job Application Skills	L2	35
3	Understanding Types of Employment Contract	L2	35
4	Developing Interview Skills	L2	35
5	Celebrating Equality and Diversity in the Workplace	L2	35
6	Understanding Work-based Rights and Responsibilities	L2	35
7	Planning for Career Entry and Progression	L2	35
8	Applying Literacy in the Workplace	L2	35
9	Applying Numeracy in the Workplace	L2	35
10	Planning the Use of Digital Products and Services in the Workplace	L2	35
11	Using IT to Manage Information at Work	L2	35
12	Assessing and Managing Risk in the Workplace	L2	35
13	Working as Part of a Team	L2	35
14	Anticipating and Meeting Customer Needs and Expectations	L2	35
15	Managing Work-related Problems	L2	35
16	Planning for and Learning from Work Experience	L2	35
17	Encouraging Environmental Awareness in the Workplace	L2	35
18	Being Entrepreneurial	L2	35

## 4 Assessment requirements

The table below gives a summary of the assessment methods used in the qualifications.

Units	Assessment method
All units	Internal assessment (centre-devised assessments).

### Language of assessment

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Learners must use English only during the assessment of this qualification. Prior approval is required for assessment in Welsh.

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

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

### Internal assessment

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Internally assessed units are subject to standards verification. This means that centres set and mark the final summative assessment for each unit, using the examples and support that Pearson provides.

To pass each internally assessed unit, learners must:

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

Centres must ensure:

- assessment is carried out by assessors with relevant expertise in both the occupational area and assessment.
- internal verification systems are in place to ensure the quality and authenticity of learners' work, as well as the accuracy and consistency of assessment.

Learners who do not successfully pass an assignment, are allowed to resubmit evidence for the assignment or to retake another assignment.

## Assessment of units

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To pass each unit, learners must independently complete assignment(s) that show that the learning outcomes and assessment criteria for the unit have been met.

Format of assignments:

- all learning outcomes and assessment criteria must be covered
- assignments can include both practical and written tasks
- assignments are independently completed as a distinct activity after the required teaching has taken place
- the brief is issued to learners with a defined start date, a completion date and clear requirements for the evidence they are required to produce
- all or parts of units can be combined into a single assignment.

Each unit contains suggested tasks that centres can use to form the basis of assignments for learners to complete. It is expected that centres will contextualise these and ensure that the final version is checked by their internal verifier.

Learners can use one piece of evidence to prove their knowledge, skills and understanding across different assessment criteria and/or across different units. The evidence provided for each unit must reference clearly the unit that is being assessed and learners should be encouraged to signpost evidence. Evidence must be available to the assessor, the internal verifier and the Pearson Standards Verifier.

Examples of forms of evidence include observation records, reflective accounts, witness testimony and products of learners' work. Learners must provide evidence of their achievement – achievement cannot be inferred from performance.

Any specific evidence requirements for a unit are given in the unit's *Assessment* section.

## 5 Centre recognition and approval

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

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

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

### Approvals agreement

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

### Centre resource requirements

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

- appropriate physical resources (for example IT, learning materials, teaching rooms) to support the delivery and assessment of the qualification
- suitable staff for delivering and assessing the qualification (see *Section 4 Assessment requirements*)
- systems to ensure continuing professional development (CPD) for staff delivering and assessing the qualifications
- health and safety policies that relate to the use of equipment by learners
- internal verification systems and procedures (see *Section 4 Assessment requirements*)

## 6 Access to qualifications

Access to qualifications for learners with disabilities or specific needs.

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

We are committed to making sure that:

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

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

Centres must deliver the qualifications in accordance with current equality legislation. For full details of the Equality Act 2010, please visit [www.legislation.gov.uk](http://www.legislation.gov.uk)

### Reasonable adjustments and special consideration

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

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

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

## 7 Recognising prior learning and achievement

Recognition of Prior Learning (RPL) considers whether a learner can demonstrate that they can meet the assessment requirements for a unit through knowledge, understanding or skills they already possess and so do not need to develop through a course of learning.

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

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

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

## 8 Quality assurance of centres

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

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

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

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

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

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

## 9 Units

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

For explanation of the terms within the units, please refer to *Section 13 Glossary*.

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

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



## Unit summary

Learning aim	Summary of suggested assessment evidence
<p><b>A</b> Understand the skills and behaviours required for identified job roles</p> <p><b>B</b> Audit own skills and behaviours in relation to specific job roles</p>	<ul style="list-style-type: none"> <li>• SWOT analysis to analyse skills and qualities, in terms of strengths, weaknesses, opportunities and threats</li> <li>• Analysis of results, suggesting possible actions to address weaknesses and threats</li> <li>• A document in any suitable format that relates to the chosen employability sector. This should describe skills, qualities, interests and experience useful in the sector, as well as strategies for overcoming weaknesses or barriers</li> </ul>

### Key teaching and learning areas

Key teaching areas include:	
Knowledge	Skills
<ul style="list-style-type: none"> <li>• Understand skills and behaviours in job roles</li> <li>• Know the possible impacts of having the required skills and behaviours</li> <li>• Know where own strengths and areas for development lie</li> <li>• Compare own skills and behaviours with those required for an identified job role</li> <li>• Know who can support the development of own skills and behaviours</li> <li>• Know how the development of highlighted skills and behaviours can be measured</li> </ul>	<ul style="list-style-type: none"> <li>• Complete an audit of own employability skills and behaviours</li> <li>• Seek input from others to support skill and behaviour audit</li> <li>• Reflect on personal strengths and areas for development</li> </ul>

## Unit content

### Approach (how the learner should approach this unit)

#### Learners will need to:

- Understand that different skills and behaviours may be necessary for different job roles, reflecting on identified jobs to illustrate their understanding
- Reflect on the importance and impact of skills and behaviours on different job roles
- Use reflection and self-evaluation skills to conduct an audit of own skills and behaviours
- Seek input from others (peers, family, teachers, tutors) to support completion of their self-audit
- Reflect on own strengths and areas for development in relation to the skills and behaviours needed for an identified job role
- Suggest strategies for improving weaker areas, including considering who might be able to support and how to measure improvement

## Knowledge

### Understand skills and behaviours in job roles

- Identify skills (things you have learned) and give examples, e.g. art, cooking, music, sport, technology, communication, teamwork, organisation
- Identify personal behaviours (the way someone acts or reacts) and give examples, e.g. organised, creative, logical, polite, reflective, positive, optimistic
- Discuss situations when different skills and behaviours are useful in the workplace
- Explain what each skill and behaviour is and how it might be used across a range of different types of job role, e.g. customer-facing role, administration role, office-based role

### Know the possible impacts of having the required skills and behaviours

- Positive
  - Explore the possible positive impact of having and portraying identified skills and behaviours in a range of different job roles
- Negative
  - Explore the potential negative impact of not having or portraying identified skills and behaviours in specified job roles

### **Know where own strengths and areas for development lie**

- Consider how skills can be developed over time

### **Compare own skills and behaviours with those required for an identified job role**

- Identify sectors where own skills and behaviours can be applied

### **Know who can support the development of own skills and behaviours**

- Identify people and/or roles that can support the development of personal work-based skills and behaviours

### **Know how the development of highlighted skills and behaviours can be measured**

- Suggest ways in which improvements in skills and behaviours can be measured
- Suggest strategies to improve weaker area

## **Skills**

### **Complete an audit of own employability skills and behaviours**

- Audit personal skills and behaviours:
  - selecting appropriate skills and behaviours to focus on, linked to identified job roles
  - selecting an appropriate method of recording results, e.g. a written document, digital voice recording
  - seeking the opinions of others as appropriate (e.g. peers, family, teachers, tutors) and using these within the audit process
- Compare audit findings to identified skills and behaviours needed for a specific job role

### **Seek input from others to support skill and behaviour audit**

- Seek input from others to get feedback and support on skill and behaviour audit

### **Reflect on personal strengths and areas for development**

- Reflect on personal strengths and areas for development in relation to an identified job role

## Assessment Criteria

<p><b>Learning aim A: Understand the skills and behaviours required for identified job roles</b></p> <p>Evidence must include:</p> <p>For identified job roles learners will provide an explanation of each of the skills and behaviours that will be necessary to do this role effectively. The learner should include both what it is and how it may be used for each identified skill and behaviour. The evidence should also include an evaluation of the importance of each skill and behaviour, looking at how having or portraying each could be of benefit to the employee and/or employer, and how not being or doing these things could negatively impact the employee and/or employer.</p>
<p><b>A.P1</b> Explain the work-related skills and behaviours necessary for identified job roles</p> <p><b>A.P2</b> Evaluate the pros and cons of having/not having work-related skills and behaviours in identified job roles</p>
<p><b>Guidance for assessors</b></p>
<p><b>For A.P1</b> Learners must describe the skills and behaviours that will be necessary and/or advantageous for different identified job roles</p> <p><b>For A.P2</b> Learners must explore the advantages of having and the potential disadvantages of not having the highlighted work-related skills and behaviours in the identified job roles</p>
<p><b>Learning aim B: Audit own skills and behaviours in relation to specific job roles</b></p> <p>Evidence must include:</p> <p>An audit, recorded in an appropriate format, that recognises strengths and areas for development of the learner's skills and behaviours, in relation to at least three identified job roles. Evidence must also include suggestions as to how weaker areas may be developed, along with who can support and how improvements could be measured.</p>
<p><b>B.P3</b> Audit own skills and behaviours, identifying strengths and areas of development, in relation to identified job roles</p> <p><b>B.P4</b> Consider ways in which identified work-based skills and behaviours could be developed</p>

**Guidance for assessors**

**For B.P3** Learners should complete an audit of their own work-related skills and behaviours and record it in a suitable format. They can seek input from external sources as appropriate. They should identify areas of strength and areas in need of development, in relation to different job roles

**For B.P4** Learners should consider how they can develop skills and behaviours that are necessary or advantageous for the specified job roles. They can suggest steps that could be taken, including others who could offer help, and how they would measure any improvement

## Delivery guidance

It is recommended that practical activities are used in the delivery of this unit to help learners develop both essential knowledge and skills. The following are suggestions for activities and workshops that can engage learners and be used in preparation for the final assessment. These are not intended as a definitive guide to cover the full GLH of the unit.

### **Activities: Introduction to unit - understand skills and personal behaviours**

Tutor explanation of the purpose of the unit, how self-assessment will be conducted and the need to reflect and evaluate. Learners should be encouraged to gather appropriate evidence throughout the unit, which could be in a logbook or electronic format. This can include downloads or printouts, completed checklists or worksheets, and any other information they research.

In groups, learners discuss what they think skills (can be learned) and personal behaviours (the way you act or react) are and produce a list of examples, on a flipchart or by sticking Post-its onto prepared charts. The group could then reflect on the charts and create individual lists of skills and behaviours, identifying their own.

In pairs, learners could consider each other's skills and behaviours and share their thoughts through feedback and peer assessment activities. Learners could ask family and friends for input on their self-assessment before the next session.

**Suggested time:** about 2 hours

### **Activities: Recognising skills and behaviours**

The tutor will provide lists of key words or phrases that describe skills and behaviours, which learners sort and decide which apply to them. They do this as an individual activity to 'sum yourself up in five words'. Peer questioning could be used to find out why these words have been chosen. Alternatively, learners can describe each other and discuss how far their own perceptions of people differ from others'.

Learners will consider which skills and behaviours would be most useful in the workplace. They might rank the top list of workplace skills in order of importance based on their chosen sector of interest and discuss their thoughts and decisions as a group.

The tutor will present some case studies of descriptions of famous people in the news for learners to try to identify based on their skills and personal behaviours. They could discuss as a group how skills can link people and the impact of different behaviours on individual success.

Learners give a presentation 'My hero'. This might be a celebrity, a sportsperson or a historical figure, colleague, friend or family member. Each learner to spend some time doing some internet research or personal reflection to give a brief talk about someone they particularly admire and respect describing their skills and behaviours.

**Suggested time:** about 3 hours

**Activities: Examine own skills, behaviours, interests and experience**

Learners complete a quiz or online self-assessment activity to identify their own skills and behaviours objectively, keeping a record of the results.

Learners highlight the skills and qualities described as well as any suggestions given for employment. They would need to include both positive and negative feedback and consider their reactions by discussing this in pairs or groups. They should note what they consider to be most significant and why.

Learners share any interests or hobbies they have with the group. All of these could be put onto a poster or chart for reference. They should be encouraged to include everything even if they think it might not be important for employability and discuss why.

Learners complete a grid to state: what I enjoy, what I have achieved, what I like about myself, what other people like in me. They might present this to the group. The group decide how each person's interests and experience might be useful in the workplace.

Learners should consider their skills, behaviours, interests and experiences to create a personal mind map to show how these are interlinked and how this combination of points makes them unique. Learners could also identify weaknesses and areas for improvement.

**Suggested time:** about 3 hours

**Activities: Assess own strengths and weaknesses**

Tutors lead a group discussion on what is meant by strengths and weaknesses. Learners could think back to the presentations and case studies. Were the people good role models? Why (not)? What were their strengths? Do/did they have weaknesses? If so, what were they?

Learners consider the strengths and weaknesses of their peers; the tutor could place each learner's name on a flipchart and learners would then write strengths and weaknesses on the flipchart for each other before discussing as a group and reflecting on the points raised by others.

Individual learners could revisit their self-assessment results to identify which skills and qualities are strengths and recognise the weaknesses identified in negative feedback.

Tutors introduce the 'tank (or wine glass) half full/half empty' analogy (the tank is like self-confidence and if it is full, you can go a long way). Learners could share ideas for improving self-confidence and discuss what motivates them the most.

The tutor shows video/YouTube clips of difficult or embarrassing situations and learners could make suggestions for improving on the weaknesses demonstrated. Case studies to be used or learners role play scenarios given by the tutor. Most of these should relate to workplace situations.

The learners suggest which weaknesses are personal and which are work-related and display the information on a poster. They then draft a flowchart of remedies or ways to turn weaknesses into strengths.

Tutor to provide learners with a picture of a famous person. Learners could finally be given a box of different words and as a group separate the words to show the strengths and weaknesses of the famous person. Tutor could ask learners to discuss any differences in opinion.

**Suggested time:** about 3 hours

### **Activities: Explore how skills, behaviours, interests and experiences link to employability sectors**

Learners share what they themselves are intending to do when their programme is over and what sort of employment they are considering or have had any experience of. This leads to a discussion on what is meant by sectors and a thought shower of potential job roles. These to be displayed on Post-its.

The tutor introduces video clips about different sectors or invites visiting speakers or arranges a Zoom/Teams meeting with a local employer, to demonstrate the key skills and behaviours that employers within sectors identified by the learners will be seeking. Learners ask questions about why the person feels they have been successful.

The tutor should explain what is meant by a SWOT analysis and learners practise using the format for making a simple decision.

Tutor to provide learners with an example problem or situation (launching a new business, moving abroad, buying a house, changing career, etc). On flipchart paper, tutor to display each part of a SWOT analysis. Learners could then identify strengths, weaknesses, opportunities and threats before discussing the group SWOT outcomes.

Learners could then produce their own SWOT analysis thinking about their transition into work and future progression.

**Suggested time:** about 4 hours

**Activities: Investigate work opportunities link to self-assessment outcomes**

Learners conduct research on some of the sectors or jobs they have considered, or which may have been indicated in their previous self-assessment to create a mind map of their chosen sectors or jobs which they can reflect on and add to throughout the activity.

Learners could interview friends, family or colleagues in their part-time job, work experience or placement to get more ideas about what work might suit them and why. They might attend a careers fair or interview with a careers adviser. The tutor should encourage learners to consider a wide range of different options to broaden learner awareness.

Learners could visit local businesses or a job centre to find out more about possible employment opportunities and the skills and qualities they would need. A local employer could deliver a short talk on what they look for in new candidates and potential employees.

Self-employment could be considered as a sector so learners could be given the opportunity to meet people who have been successful in setting up their own business and interview them to understand their experiences and challenges. Learners could work in pairs to come up with ideas for self-employment or businesses based on their skills and behaviours, i.e. art skills and creativity could lead to graphic design businesses.

The tutor demonstrates some recruitment websites and explains how they can be used to search for opportunities and filter results. Tutor to display a series of jobs and ask learners to work in pairs to access recruitment websites and identify key information for each job.

Learners then reflect on their learning and identify one sector that they would like to follow for their career. Learners will review their SWOT analysis and prepare a short rationale for their choices based on their interests, experiences, skills and behaviours. Learners give a short talk to the group about why they think this is a good choice and what sort of jobs they would be looking for.

Learners reflect on their research and create a personal work plan which identifies key long-term goals for employment or self-employment.

**Suggested time:** about 5 hours

**Activities: Identify barriers to employment and strategies to overcome them**

Learners identify any gaps in their skills or barriers to their progress in personal or work-life settings that their self-assessment and SWOT have shown. Learners to share with the group for discussion about what sort of support might be useful in overcoming individual barriers.

The barriers identified to be displayed and grouped into categories, such as personal life, routines, wellbeing, work-related. Learners could discuss skills and behaviours that may be helpful, and how different timescales might be needed and how personal attitude and vision can play a part in achieving these.

They discuss where they might get help and advice to find out more, e.g. friends, family, tutor, careers adviser, training, mentor, line manager, supervisor and make a record of the support and advice that they might give. Learners will create a cheat sheet of go-to people for future reference.

Learners could select a person to meet with to talk about their career path and barriers that they have faced. Alternatively, learners might research their career path online and read case studies about other people who have entered the sector and the challenges and barriers that they have overcome.

The tutor could provide learners with a fictional case study of a person experiencing barriers to employment and ask learners to work in pairs or small groups to describe strategies that the person could use. Learners could share their ideas with the whole group to create a plan.

Learners will reflect on learning and identify their own barriers and ways of overcoming these as a resource for future progress.

**Suggested time:** about 4 hours

### **Activities: Personal profiles – preparation for assessment**

The tutor explains the purpose and function of a personal profile and provides the learners with examples of good and bad profiles. Learners to work in pairs to highlight key information and areas that they feel are particularly good within the sample personal profiles.

Learners will gather the evidence from their self-assessments, SWOT, meetings with others and their research throughout the unit.

The tutor will provide template personal profiles for the learners to follow as a structure for the activity. Learners could also explore mobile applications, checklists, spreadsheets and online resources to select the best format in which to manage and produce their personal profile.

Learners should individually create a personal profile which identifies their skills, behaviours, interests and experience and highlights their strengths. Learners should then work in small groups to review each other's personal profiles and provide feedback and comments for improvement.

The tutor could explore personal weaknesses with the group and ask learners to think about ways that these could be addressed or how they could turn weaknesses into strengths. The tutor could give examples and ask learners to work in pairs to resolve weaknesses.

**Suggested time:** about 4 hours

**Activity: Preparation for assessment**

The tutor reminds learners of the requirements of the assignment brief and answers any further questions that learners may have.

Group recap on key unit concepts and topics with the tutor using direct questioning to challenge learners and check understanding.

**Suggested time:** about 1 hour

**Activity: Post assessment**

Learners will take part in a group discussion to highlight the key points from the unit and how these can be used for their future progression.

Learners reflect on the notes they have produced from reference documents. They summarise what they have gained from the unit and how this will help them with their progression.

**Suggested time:** about 1 hour

## **Suggested assessment activity**

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set duration in which to complete the activity. The activity below is a suggested example. Centres are encouraged to design their own assessment activities based on the interests of the learner and the resources available locally.

### **Task**

Your task is to demonstrate how you will apply your own skills, behaviours, interests and experience to potential job roles, and how you can improve skills and behaviours for employment.

You will need to research and select a minimum of two different job roles within a chosen sector and produce a fact sheet for each role. Your fact sheet should explain the skills and behaviours required for each job role and provide an evaluation of the pros and cons of not meeting the requirements of each role.

You will then need to use your selected job roles to assess your own skills and behaviours to identify strengths and areas of development in relation to each role.

You should finally consider your areas of development and create a plan for developing your skills and behaviours in relation to the job roles chosen.

### **Retake**

The learner could explore different job roles, or different sectors of employment.



## Unit summary

Learning aim	Summary of suggested assessment evidence
<p><b>A</b> Research job vacancies</p> <p><b>B</b> Complete necessary documentation to apply for a job</p>	<ul style="list-style-type: none"> <li>• A written or otherwise presented explanation of the job search process</li> <li>• Completed job application documentation</li> </ul>

### Key teaching and learning areas

Key teaching areas include:	
Knowledge	Skills
<ul style="list-style-type: none"> <li>• Understand own skills and qualities</li> <li>• Understand where to source suitable job opportunities</li> <li>• Identify key information needed for applications</li> <li>• How to present self, experience and skills in writing</li> </ul>	<ul style="list-style-type: none"> <li>• Handling information</li> <li>• Establishing information required by a job application form</li> <li>• Completing all job application documentation</li> </ul>

## **Unit content**

### **Approach (how the learner should approach this unit)**

#### **Learners will need to:**

- Use research skills to find appropriate job role advertisements
- Select suitable job opportunities
- Complete appropriate documents in support of a job opportunity
- Identify own skills, qualities and experience, e.g. self-reflection, self-analysis
- Handle information, e.g. selecting suitable job opportunities
- Present personal information, e.g. organising information effectively, creating a positive impression, targeting the job opportunity criteria

#### **Knowledge**

##### **Understand own skills and qualities**

- Understand own skills and qualities, e.g. analysing current skill set and experience, in relation to job roles

##### **Understand where to source suitable job opportunities**

- Understand where and how to source suitable job opportunities, e.g. different publications, job centres, internet, agencies, local sources

##### **Identify key information needed for applications**

- Likely information given on a job advertisement
- Possible information that a job application might ask for, e.g. checking adverts, job descriptions, person specifications to determine skills and qualities required, researching organisation

##### **How to present self, experience and skills in writing**

- Different formats that can be used to apply for job vacancies, e.g. application forms, letters, CV, phone calls, emails/letters to express interest
- How to present self, experience and skills in writing, e.g. developing CVs, completing application forms, covering letters, letters of interest
- How to complete application documents, e.g. presenting relevant information

## **Skills**

### **Searching and selecting a relevant job advertisement**

- Selecting and using appropriate job search platforms to refine job search activities and identify relevant job advertisements
- Reflecting on personal requirements in line with job searching and job vacancies
- Interpret the information contained within job adverts

### **Establishing information required by a job application form**

- Research the requirements of job applications
- Gather information and resources required to complete a job application form
- Reflect on the requirements outlined within a job advertisement and job application form

### **Presenting personal information/completing all job application documentation**

- Gather relevant personal information required for job application documentation
- Plan and draft required documentation and seek feedback from others
- Review documentation for accuracy and professionalism
- Produce final copies of job application documentation

## Assessment Criteria

<p><b>Learning aim A: Research job vacancies</b></p> <p>Evidence must include:</p> <p>Analysis of the various places job vacancies may be advertised, an explanation of possible information that a job advertisement or application pack may provide, including its relevance to prospective candidates and employers, and an evaluation of the information that may be required when completing a job application, including any possible downsides of asking for this information.</p>
<p><b>A.P1</b> Analyse places where job vacancies can be found</p>
<p><b>A.P2</b> Explain the information that may be provided by a job advertisement and/or application pack</p>
<p><b>A.P3</b> Evaluate information that may be required when applying for a job</p>
<p>Guidance for assessors</p>
<p><b>For A.P1</b> Learners must analyse the various places in which they might find jobs advertised, including specific types of platform or sources for specific types of job role and how to search for roles of interest efficiently. Learners should provide examples to support their answer</p>
<p><b>For A.P2</b> Learners must explain the information that is often provided by a job advertisement or application pack, suggesting how and why each piece of information may be useful for both prospective candidates and potential employers</p>
<p><b>For A.P3</b> Learners must evaluate each of the various bits of information that they may be required to provide when applying for a job, including why each element might be of use to a potential employer and if there could be any downsides of asking for this information, e.g. potential candidates discounting themselves because they do not exactly meet the requirements</p>
<p><b>Learning aim B: Complete necessary documentation to apply for a job</b></p> <p>Evidence must include:</p> <p>The selection of an appropriate job advertisement, with an explanation of the research process undertaken. Evidence must also include completed documentation required to apply for the selected job role.</p>
<p><b>B.P4</b> Use research skills to find and select an appropriate job role to apply for</p>
<p><b>B.P5</b> Produce relevant evidence to fully meet the requirements of a chosen job application process</p>

### Guidance for assessors

**For B.P4** Learners must use research skills to find appropriate websites and/or other possible sources to find and select a job to apply for. The job should meet their requirements in terms of area of interest, salary bracket, matching their skills and experience. Learners should be able to share the process they undertook to find the job advertisement and confirm how their selection is appropriate to them

**For B.P5** Learners will complete the required application documents, e.g. application form, covering letter, CV in order to apply for their selected job role. The documents they produce must clearly detail why the learner is interested in the role and how their skills and experience match the requirements of the job opportunity

## Delivery guidance

### **Activity: Introduction to unit**

Tutor-led activity to introduce the requirements of the unit, including purpose, ways of working, expected learning outcomes, expectations of learners and assessment methods.

At the start of the unit, learners to be given CV templates and other relevant documents and record information on their own CVs as they progress through the activities. Share with tutor in an appropriate online format, so that the tutor can check as they are going through the unit.

**Suggested time:** about 2 hours

### **Activities: Matching skills, interests, qualities and behaviours**

What do we mean by skills, interests, qualities and behaviours? Tutor-led discussion about the differences. Tutor to display three flipcharts around the classroom and learners will use Post-it notes to provide ideas and suggestions for each: skills, interests, qualities and behaviours.

Tutor-led discussion to create a Venn diagram to highlight areas where skills, interests, qualities and behaviours can be combined, connected and encompassing of each other.

In small groups, learners create an 'about us' wall showing their skills, interests, hobbies and personal qualities related to employment. Learners can then review the other groups' work and ask questions to find out how they feel their suggestions link to employment and how they could be used to help them find work.

Learners could complete some of the online personality/skills matching questionnaires and compare the difference between results. Learners work in pairs to compare their results and find similarities and differences in relation to their peers.

Tutor to provide learners with a picture of a famous person. Learners to mind map around the person to show their perceived skills, interests and personal qualities and provide feedback in discussion as to their suggestions.

Learners to carry out personal research by talking to friends, family, tutors and employers to identify their personal skills and qualities. Learners could create a questionnaire that others can complete to provide feedback which they could then evaluate and discuss with others.

Tutor to take a cross-section of learner interests and display them around the classroom. Learners will review each interest and write down a list of different jobs that could be linked. Alternatively, learners may work in small groups to share their interests and hobbies and match job roles.

**Suggested time:** about 4 hours

### **Activities: Job advertisements**

Learners word shower, in small groups, where jobs, apprenticeships and work placements are advertised.

Tutor-led activities based around employment/apprenticeships/placements/voluntary work and how these are advertised. Tutor provides examples and opportunities for learners to look at where these are advertised for their chosen employment sector.

Learners access different sources that advertise job vacancies in their chosen sector. This includes an internet search, social media, local library, shop noticeboards, etc.

Learners to visit the local job centre and/or recruitment companies to explore different job advertisements. Learners could talk to job centre staff or recruitment advisers about different advertisements, jobs and opportunities in the area.

Learners could also explore the local area to identify job adverts in shop windows or in local community spaces.

Tutor to provide learners with a range of print-based/newspaper job adverts. Learners to review the adverts and make a list of the common pieces of information that are included: salary/pay, hours, location, job title, etc. Learners could then look at their own ideal jobs online and compare the information for different jobs.

Learners create a sample job advertisement for a job of their choice which they will display in the classroom. Learners could then evaluate each other's adverts and say what attracts them to apply and what puts them off.

**Suggested time:** about 3 hours

### **Activities: Researching, sourcing and accessing job adverts**

Learners to be asked to identify different ways that they could search for job adverts and access information about different jobs as a recap activity from previous section.

Tutor to provide learners with a job role/sector and ask them to use Post-it notes to identify all of the different names, titles, descriptions or identifiers that could be used when advertising a job – waiter, waitress, server, front server, front of house, waitstaff, waitron, garçon, attendant.

Learners to then select a job role from a sector of their choice and mind map the different titles, names and descriptions that could be used when advertising, and work in pairs to search, using job advertisement websites, for different jobs.

Learners can then compare the findings and think about the differences and similarities of the job based on the role title or identifier. Learners should share their findings and thoughts in group discussions.

Tutor to ask learners to think about how they can filter and narrow research. Learners to provide suggestions in discussion as to how they could tailor their research and sourcing of job adverts more specifically: location, salary, distance from home, temporary/permanent, company name, etc.

Learners to carry out independent research and job searches using filters to narrow down their options and identify what is and is not available to meet their needs. Learners could then feedback their findings and thoughts to peers.

**Suggested time:** about 3 hours

### **Activities: Key information in job adverts**

Learners compile a checklist of key information in job adverts that informs a potential candidate what they need to know and what an employer is looking for. For example, specific skills/experience required, location, working hours, salary, benefits, how to apply, closing date, supporting documents giving further details, such as job descriptions.

Learners look at a job description/person specification and the tutor could explain the importance of referring to this when completing applications if such documentation is supplied as part of the process, learners highlight key areas.

Learners could be provided with a sample job description/person specification and in pairs note the information that they would need to prepare and any questions that they may have before sharing with the group.

If appropriate, learners could visit a local job centre and find out about the different jobs advertised and record the relevant information in the adverts.

Tutor to recap on the different sources of job adverts. Learners to research one job title and compile a range of different job adverts for the same/similar job title. Learners will highlight similarities and differences and share their findings with the group. Tutor to explain the reasons why adverts may include different information and why there will be similarities.

Careers advisers may be invited to speak, and learners prepare questions to ask relevant to searching for jobs and key information that employers are looking for.

Tutor to provide learners with job adverts which have been adapted to omit some key information. Learners to work in small groups to research and complete the job adverts with the appropriate information based on their research and understanding.

Learners to work in small groups and select a job role that they want to explore further. Each learner will independently search for the job online. Learners can then review the collected job adverts to identify similarities, differences and how key information can differ.

Learners could then take part in an interactive quiz to find key information in job adverts and recognise missing information.

**Suggested time:** about 4 hours

### **Activities: Completing a personal statement/personal profile**

Tutor explains the purpose and suggested length of a personal statement in a job application. A personal statement should include specialist skills, personal qualities and attributes, qualifications, interests.

In small groups, learners word shower or mind map what sort of things need to go under the headings: skills/attributes/knowledge/experience.

Learners to work in small groups, with each member being allocated skills, attributes, knowledge or experience. Each learner to draft their section before combining it with the others in their group to create one personal statement; learners should swap their statements with other groups and provide feedback on their thoughts and feelings when reading the statement: what was good? What was bad? Would you employ them? Why?

Learners to review a sample of different personal statements and rank them from best to worst in small groups. Learners to share their ideas and discuss similarities and differences as a whole group.

Tutor explains the purpose of personal statements for further education and learning. Tutor to provide learners with example personal statements for university, apprenticeships or internships. Learners to discuss as a group the difference between academic statements and work-ready statements.

Learners to create a short questionnaire to use to gather people's comments, thoughts and opinions about them to aid in the production of a personal statement. Learners to reflect on their feedback and findings and highlight key points they want to use within their personal statements/feedback. Learners should consider a range of people to complete their questionnaire.

Learners to work independently to draft their own personal statement/profile. Learners may wish to share their profiles with others for feedback. Alternatively, the tutor may pick sections from various learner produced statements and display these for collective discussion and feedback.

Learners to work on producing a final version of their personal statement.

**Suggested time:** about 4 hours

**Activities: Speculative letters and cover letters**

Learners identify a list of key features of formal and informal letters. Tutor to review features and explain the layout, content and formality of letters and their relation to employment and applications.

Tutors show learners a range of speculative letters and explain the purpose of the document in targeting many different employers to seek work/experience. Learners to identify reasons why people might use speculative letters and how they feel they could be successful.

Learners to work independently to create a speculative letter for either employment or work experience.

Tutor to show learners a range of cover letters/letters of application and explain the purpose of the documents, use of formal language, tailoring letter to job role, layout, explaining gaps in work or experience, outline suitability for the job role. Learners can practise writing some of their own.

Learners to be provided with a range of good and bad covering letters. In pairs, learners will read the letters, highlight strengths and weaknesses, and then rank the letters from best to worst, discussing their decisions with peers. Tutor will review the letters and provide feedback.

Tutor shows a range of covering letter templates. Learners produce their own for specific jobs they identify online.

**Suggested time:** about 3 hours

**Activities: Producing different application documents**

In small groups, learners produce a list of 'application documents' that they will share with the wider group in discussion. Tutor to explain the types of application documents that they may need to produce, providing examples.

Tutor-devised activity with information that should, and information that should not, go into a letter of application either online or paper-based, or a CV.

Learners to review sample letters of application and identify the strengths and weaknesses of these. Learners to work in pairs to consider whether they would continue an application based on the letter presented. Tutor to ask each pair on their decision and give reasons why.

Tutor shows a range of covering letters/letters of application templates and discusses the benefits and drawbacks of each with the learners. Learners may alternatively wish to produce their own template and share this with the group. Learners will select a template and produce their own covering letter/letter of application for a job.

Tutors show learners a range of different application forms either online or paper-based. Learners discuss the differences and similarities.

Learners to be given basic application forms that ask for the learner's personal details, interests and skills that they then fill in. Tutor to discuss the benefits of typing and handwriting applications and how the method of completion may demonstrate skills to an employer in line with the job (typing shows IT skills, handwriting shows written skills, neatness and presentation).

Tutors provide learners with different CVs from a range of appropriate jobs. Learners could highlight anything they think would be useful for their application or CV. Tutor to encourage learners to think about the benefits of a job specific CV compared to a general CV. Learners to share their thoughts in discussion.

Learners to select a job advertised within their sector of choice. Learners independently complete a sample application form, covering letter and CV for the job. Learners undertake peer assessment of completed job application documents and provide feedback.

Tutor to lead discussion with learners on the importance of checking and seeking feedback from others on job application documentation. Learners to provide thoughts through discussion.

Learners to reflect individually on feedback and create a personal cheat sheet for job applications which include key points for their own development and reference (keep applications neat, use a computer for letters, check spelling, etc.).

**Suggested time:** about 5 hours

#### **Activity: Preparation for assessment**

The tutor reminds learners of the requirements of the assignment brief and answers any further questions that learners may have.

Group recap on key unit concepts and topics with the tutor using direct questioning to challenge learners and check understanding.

**Suggested time:** about 1 hour

#### **Activity: Post assessment**

Learners will take part in a group discussion to highlight the key points from the unit and how these can be used for their future progression.

Learners reflect on the notes they have produced from reference documents. They summarise what they have gained from the unit and how this will help them with their progression.

**Suggested time:** about 1 hour

## **Suggested assessment activity**

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set duration in which to complete the activity. The activity below is a suggested example. Centres are encouraged to design their own assessment activities based on the interests of the learner and the resources available locally.

### **Task**

Your task is to explore job vacancies and job applications and demonstrate that you can source, research and apply for potential job roles in line with sector requirements.

You will need to carry out research into two different places jobs are advertised and produce a document of your choice to provide an analysis of these sources.

Using your research, you need to produce a fact sheet that explains the information provided by job advertisements or application packs and evaluates the information that applications require you to provide.

You will then need to search for an appropriate job role within a sector of your choice and complete the application process to demonstrate that you are able to produce a CV, covering letter and application form to a professional standard.

### **Retake**

The learner could explore a different place to find job advertisements and complete application documentation for an alternative position.

## **Unit 3: Understanding Types of Employment Contract**

<b>Level:</b>	<b>2</b>
<b>Guided learning hours:</b>	<b>35</b>
<b>Total unit time:</b>	<b>35</b>

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### **Unit in brief**

The aim of this unit is for learners to develop an understanding of types of contracts and the impact these have for individuals in the workplace.

### **Unit introduction**

There are many ways of contracting employees in the workplace to serve a variety of purposes for employers and employees; it is important to understand different contracts and their implications in order to make appropriate choices. It is also important to consider both long-term and short-term goals to determine the ways of working that may lead to the achievement of future plans.

In this unit you will investigate different ways of working and consider the advantages and disadvantages of each for both employees and employers.

## Unit summary

Learning aim	Summary of suggested assessment evidence
<p><b>A</b> Understand the use of types of employment contract in a range of job roles</p> <p><b>B</b> Compare and contrast types of employment contract</p>	<ul style="list-style-type: none"> <li>• A written document, digital voice recording, filmed presentation or other evidence that shows the learner can meet the assessment criteria</li> <li>• Film or voice recording, written transcript or written notes of the debate to evidence what was seen and heard</li> </ul>

## Key teaching and learning areas

Key teaching areas include:	
Knowledge	Skills
<ul style="list-style-type: none"> <li>• Contracts and working patterns</li> <li>• How work patterns can impact on mental and physical wellbeing</li> <li>• Advantages and disadvantages of different work opportunities and contracts</li> <li>• Why employers might select different types of work contract</li> </ul>	<ul style="list-style-type: none"> <li>• Research</li> <li>• Information handling</li> <li>• Analysis of key facts</li> <li>• Using appropriate communication skills</li> </ul>

## **Unit content**

### **Approach (how the learner should approach this unit)**

#### **Learners will need to:**

- Understand that different sectors offer different contractual terms and conditions for employees
- Recognise that people may have different employment needs to others, e.g. the need to work part time or have flexible working
- Understand the reasons for individuals selected and requiring specific work patterns, contractual terms and benefits in employment
- Recognise how working patterns can impact on wellbeing
- Use reflection to identify personal expectations and requirements of contractual terms, working patterns and wellbeing for work
- Communicate appropriately with others

### **Knowledge**

#### **Contracts and working patterns**

- Contracts, e.g. employee, worker, self-employed, zero hours, apprentice
- Essential contractual terms for employees, e.g. salary, working hours, job title, annual leave
- Additional contractual terms for employees, e.g. commission, rewards, benefits, training opportunities
- Working patterns, e.g. part time, full time, shift work, working from home
- Work opportunities, e.g. freelancing, apprenticeships, gig economy, agency working
- Contractual issues, e.g. change of contract, contractual dispute, change to conditions

#### **How work patterns can impact on mental and physical wellbeing**

- Advantages and disadvantages of different work patterns for mental and physical wellbeing
- Negative impacts on mental and physical wellbeing, e.g. stress, burnout, work overload, confusion, poor memory, tiredness, fatigue, body aches and pains, tension
- Importance of work-life balance for mental and physical wellbeing

## **Advantages and disadvantages of different work opportunities and contracts**

- Advantages and disadvantages of different work opportunities and contracts, e.g. pay benefits, job security
- Potential advantages of different types of employment contract for employers, e.g. financial, time, workload (e.g. to cover busy periods)
- Potential disadvantages of different types of employment contract for employers, e.g. finding staff willing to work, loyalty, training and experience
- Potential advantages of different types of employment contract for employees, e.g. work-life balance
- Potential disadvantages of different types of employment contract for employers, e.g. inability to plan time or finances (e.g. zero hours)
- Why employers might choose specific types of contract for their employees

## **Skills**

### **Establishing information found in contracts**

- Researching employment contracts across different sectors and job roles
- Gathering information of different types of employment and working patterns
- Reviewing employment sectors to establish similarities and differences in contractual terms, conditions and benefits

### **Information handling and interpretation**

- Reading documents and understanding content, terminology and meaning, e.g. contractual terms, legal language and terminology
- Applying information to given scenarios and contexts to identify similarities and differences
- Reviewing information to form opinions and ideas based on evidence and findings
- Presenting ideas, opinions and information appropriate in debates

### **Using appropriate communication skills with others**

- Engage with others, building relationships through body language, communication and interpersonal skills
- Ask and answer questions, e.g. open-ended questions, closed questions, leading questions
- Share own opinions and be respectful of others' opinions and thoughts
- Work with others to debate topics and concepts respectfully and appropriately

## Assessment Criteria

<p><b>Learning aim A: Understand the use of types of employment contract in a range of job roles</b></p> <p>Evidence must include:</p> <p>An explanation of the different types of employment contract, along with an analysis of the reasons why employers might use one or more of each of the identified types of employment contract.</p>
<p><b>A.P1</b> Explain different types of employment contract</p>
<p><b>A.P2</b> Analyse why an employer might use one or more types of employment contract</p>
<p><b>Guidance for assessors</b></p>
<p><b>For A.P1</b> Learners will explain the different types of employment contract that a business or organisation might use, including examples from different employment sectors to support their answer</p>
<p><b>For A.P2</b> Using a sufficient number of businesses or organisations to ensure all identified types of business contract are included, learners will analyse the reasons why an employer might choose to use one or more types of employment contract, highlighting various factors which may influence their decision (e.g. financial considerations, type of work, amount of work) giving examples to support their answer</p>
<p><b>Learning aim B: Compare and contrast types of employment contract</b></p> <p>Evidence must include:</p> <p>An evaluation of the potential positive and negative aspects of different types of employment contract for employers and employees. Evidence must also be gathered from the learner's participation in a debate, where they will demonstrate their understanding of different types of employment contract.</p>
<p><b>B.P3</b> Evaluate potential positive and negative aspects of different ways of working</p>
<p><b>B.P4</b> Plan for and participate in a debate about types of employment contract</p>

### Guidance for assessors

**For B.P3** Learners should evaluate the potential positive and negative aspects of each identified type of employment contract, considering various factors which may influence both the employer, e.g. financial considerations, type of work and amount of work, and the employee, e.g. time available, earning potential and financial requirements

**For B.P4** Learners work with peers to take part in a debate about different types of employment contract. Using arguments/statements predetermined by the tutor/teacher (e.g. 'all employees should be able to choose the type of employment contract they want to work under'), the learner will choose or be allocated a 'side', research and prepare their argument and then take an active part in the debate itself. Learners can reflect on their performance, e.g. the points they made, how well they knew their subject and how successfully they feel they gave their opinion

## Delivery guidance

It is recommended that practical activities are used in the delivery of this unit to help learners develop both essential knowledge and skills. The following are suggestions for activities and workshops that can engage learners and be used in preparation for the final assessment. These are not intended as a definitive guide to cover the full GLH of the unit.

### **Activities: Introduction to unit**

Tutor-led activity to introduce the requirements of the unit, including purpose, ways of working, expected personal learning outcomes and assessment methods.

Learners will be asked if any of them do any paid or unpaid work and if they do how many hours of work they undertake, are there any terms and conditions they must follow and what does their employer provide, do they get any extra benefits, such as free meals, if they work in a food establishment.

**Suggested time:** about 2 hours

### **Activities: Employment and the law**

Tutor to explain that employment is covered in the UK by different pieces of legislation which says what employees and employers should and shouldn't do within the workplace. Tutor to ask learners what they think the law says about employing people and what it says about contracts. Learners should share their ideas on Post-it notes.

Learners to work in pairs to research different laws that link to employment and contracts and present these for display in the classroom. Tutor to provide challenge by encouraging learners to look at older laws and how these have been changed.

Tutor to introduce learners to ACAS (Advisory, Conciliation and Arbitration Service) and explain its purpose in supporting employees and employers in dealing with employment issues, contract advice and mediating if there are disputes. Learners to access the ACAS website and make a list of the different things that ACAS offers to both employees and employers. Learners to share their findings.

A human resources (HR) representative, ACAS adviser or local Citizens Advice volunteer could be invited in as a guest speaker to explain the process of agreeing contracts and making sure that when a company employs someone that they do so in a legal manner. Alternatively, learners could prepare questions that they could ask different people about their experience of being employed and receiving a contract.

Learners to work in pairs and be given a range of scenarios of work-related challenges that employees might face in regard to their contract and employment. Learners to review the scenarios and use their research to decide what the potential outcome could be and where the individual should go for advice and support. Learners to share their findings.

**Suggested time:** about 3 hours

### **Activities: Contracts of employment**

The tutor explains that a contract regarding employment or for conducting paid work is a legally binding document with terms and conditions that those offering work and those accepting work agree to abide by.

Learners will be asked to research what information is likely to be contained within a contract and why each area is important for all parties, areas such as hours of work, holidays, pay, expected behaviours (confidentiality, professionalism) could be discussed.

Learners create a list which they can share with others in the group. Learners will collectively create a final list of key information for contracts.

In pairs, learners will each take one piece of information needed in a contract and lead a short presentation as to why this is important for the employee and the employer.

Tutor to provide learners with a contract separated into pieces. Learners to work in pairs to reconstruct the contract so that it is structured appropriately. Tutor to explain the structure of contracts and the usual layouts.

Learners look at and discuss some additional benefits some jobs may have, such as health care, discounts, sales commission, equipment (vehicles, mobile phones, laptops). Learners search for online jobs and identify those which have additional benefits offered in their adverts. Tutor to ask learners to consider why employers might offer additional benefits.

Learners could be asked to consider what terms and conditions and additional benefits would be essential/important to them when starting work. Learners could produce and deliver short presentations to the group to outline their choices.

In pairs, learners should construct a sample contract based on the information they have learned and share this with others in the group for feedback and discussion.

Learners to discuss the importance of reading contracts and understanding the content. Learners to identify the potential consequences of not reading and understanding a contract.

**Suggested time:** about 6 hours

### **Activities: Employment status and contracts**

Learners in groups look at a range of contracts and compare and contrast the terms that form part of the contracts; these could include full time, part time, apprenticeships, fixed term, seasonal, flexible, cover, e.g. maternity, commissioned work, zero hours, voluntary, basic rate, hourly rates, daily rates, commission only, self-employed, consultant, fixed fee for work carried out. Learners to feedback their findings to the group.

Learners then look at the advantages and disadvantages of each for the employer and the employee for each type of contract and discuss their findings and views. Learners should identify the types of contract that they would and wouldn't accept as employees and explain why in discussion.

In three groups, learners will consider either employee, worker or self-employed and create a group presentation to outline the employment status, its basic rights, and obligations, such as tax and insurance. Learners should question other groups to learn more about each status.

Videos could be used to outline the differences between statuses and employment rights.

Guest speaker or visit to HR practitioner to explore employment status and contracts and the benefits and drawbacks.

Learners then research their chosen sector and create a mind map or thought shower of the different jobs in the sector and the employment contract that they are likely to have.

Quiz assessment on the different types of employment, benefits, contract and status to assess learning and understanding.

**Suggested time:** about 7 hours

### **Activities: Patterns of work and work-life balance**

Learners research what is meant by work-life balance and why it is important.

Learners watch a short video about work-life balance and discuss the impacts of not having an appropriate work-life balance.

The tutor explains that different patterns of work may be more suitable to different people and their circumstances, and that different patterns may allow for a better work-life balance. Learners to discuss their understanding and experience of work patterns and share their knowledge.

Learners to be given some different scenarios detailing patterns of working, these could include areas such as home/remote working, shift work, flexible working. Learners discuss why these patterns might work for some individuals and the impact of the patterns in relation to work-life balance.

Learners to be given example case studies of different employees with different work patterns. Learners to work as a small group to provide advice and guidance for the employee on how to improve their work-life balance.

In pairs learners to create a questionnaire to research people's opinions and feelings about different patterns of work and work-life balance. Learners to carry out the questionnaire and present their findings to the group. Learners to reflect on outcomes and suggest the most appropriate pattern of work for good work-life balance.

They have a talk from a guest speaker, for instance, a person who has changed their working pattern to suit their lifestyle and the impact that has had on them.

Learners could finally create a flyer or leaflet about the benefits of working patterns and work-life balance to demonstrate understanding.

**Suggested time:** about 6 hours

### **Activities: Making an informed choice**

Learners independently research the patterns of work in their own sector and in specific job roles of interest. Learners should reflect on each role and explain how they think the working pattern would impact on them.

Guest speakers to be invited in to discuss how they chose their jobs and made informed choices based on the information they were provided and the contractual agreements.

Learners to be asked to think about their own preferences for work and the types of work patterns and choices they would consider. They discuss their preferences with the rest of the group and the advantages and disadvantages that the pattern would give them.

Learners to research in pairs the different sources of information to help people make informed choices about careers and employment. Learners should consider both written and human sources of support, such as contracts, company charters, legislation, Citizens Advice, family and friends, careers advisers, tutors. Learners should then present their findings to the group for discussion.

Learners could then create an individual flowchart for future reference showing key questions and queries that they would want answered to make informed decisions about their career and employment. Questions might include: is the salary/pay suitable for me? Can I get to the job easily or is it challenging? Do I get any added benefits? Will I enjoy the job? Will the job/role cause me lots of stress? What impact will the job have on my work-life balance?

Tutor to recap on learning and encourage learners to discuss their thoughts and opinions in relation to employment and contracts.

**Suggested time:** about 4 hours

**Activity: Preparation for assessment**

The tutor reminds learners of the requirements of the assignment brief and answers any further questions that learners may have.

Group recap on key unit concepts and topics with the tutor using direct questioning to challenge learners and check understanding.

**Suggested time:** about 1 hour

**Activity: Post assessment**

Learners will take part in a group discussion to highlight the key points from the unit and how these can be used for their future progression.

Learners reflect on the notes they have produced from reference documents. They summarise what they have gained from the unit and how this will help them with their progression.

**Suggested time:** about 1 hour

## **Suggested assessment activity**

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set duration in which to complete the activity. The activity below is a suggested example. Centres are encouraged to design their own assessment activities based on the learner interests and the resources available locally.

### **Task**

Your task is to investigate different types of contracts and employment statuses, and the impact, both positive and negative, of these on employees.

You will need to consider different ways of contracting employees and others to work and analyse the advantages and disadvantages of each way of contracting on the individual and the company.

You will then need to research positive and negative aspects of different ways of working, considering different employment statuses, the rights associated with each and the impact of these on work-life balance.

You will finally be provided with a challenging statement about contracts and employment. You will discuss your research findings and challenge viewpoints about the given topic referring to different contracts, contractual conditions, work-life balance and your own opinions in a group debate.

### **Retake**

The learner could explore different types of contract and employment statuses and engage in a different topical debate.



## Unit summary

Learning aim	Summary of suggested assessment evidence
<p><b>A</b> Understand how to plan and prepare for interviews</p> <p><b>B</b> Participate in an interview</p>	<ul style="list-style-type: none"> <li>• An action plan showing steps to take before, during and after an interview</li> <li>• An observation record confirming performance in an interview</li> </ul>

## Key teaching and learning areas

Key teaching areas include:	
Knowledge	Skills
<ul style="list-style-type: none"> <li>• Importance of interviews for the organisation and candidate</li> <li>• Different formats, styles and contents of interviews</li> <li>• Information needed prior to an interview</li> <li>• How to action plan steps to take before, during and after an interview</li> <li>• Interview questions to answer</li> <li>• Interview questions to ask</li> <li>• Interview techniques</li> </ul>	<ul style="list-style-type: none"> <li>• Research into the company, course, etc.</li> <li>• Use of job description and/or person specification to support planning and research</li> <li>• Plan information they will share during the interview</li> </ul>

## **Unit content**

### **Approach (how the learner should approach this unit)**

#### **Learners will need to:**

- Plan, e.g. identify how to present information at an interview, questions to ask, how to respond to questions positively
- Research, e.g. gather information about the role/opportunity in order to answer questions effectively
- Communicate and use appropriate behaviours, e.g. present information verbally, engage with others, greeting, smile, eye contact, body language
- Appreciate the need for appropriate personal appearance, e.g. hygiene, suitable clothing for the interview situation
- Respond positively to the interview situation
- Consider how they might act in a future, given situation

#### **Knowledge**

##### **Importance of interviews for the organisation and candidate**

- Rationale for an interview, e.g. course, job, new opportunity
- Importance of an interview for the organisation and candidate

##### **Different formats, styles and contents of interviews**

- Different formats of interview, e.g. individual, group, panel, phone, video, multiple-round
- Styles of interview, e.g. behavioural – focusing on your behaviour in previous positions and actions, open-ended – focusing on allowing the interviewee to provide broad answers and communicate freely, situational – focusing on scenarios and real-life issues to general responses and discussion
- Potential contents of an interview, e.g. greeting, introduction, information check, interview questions, candidate questions, conclusion, follow up

##### **Information needed prior to an interview**

- How to interpret a job description and/or personal specification in preparation for interview
- Information needed prior to an interview, e.g. where it is, how to get there, timings, what to wear

## **How to action plan steps to take before, during and after an interview**

- How to use action planning to formulate a strategic approach to the interview process
- Actions to carry out before the interview, e.g. planning the route, transport, timings, practice interviews with friends, research activities
- How to use action planning to identify and formulate responses to potential job role specific questions or queries
- Actions to carry out after the interview to seek feedback and highlight areas for development
- How to consider and plan own future actions or areas for improvement

## **Preparing for potential interview questions**

- Likely interview questions that may be asked
- How to research relevant information to inform answers to potential questions
- Researching sample responses and how to use previous experience to prepare for questions
- Possible questions to ask, e.g. information they want to know about the job, placement or course

## **Interview techniques**

- Researching and preparing for the interview: knowing the business, location, interview details, likely questions, etc.
- Interacting appropriately with the interviewers, e.g. listening, responding appropriately to questions, communicating clearly, maintaining eye contact, open body language
- STAR technique: situation, task, action, result
- How to manage nervousness, e.g. breathing techniques, practice sessions, confidence talks

## **Skills**

### **Research**

- Research into the company, e.g. its location, size, successes, recent news, future plans, product range, values
- Research into the course/training programme, e.g. its location, the entry requirements, outcomes, accreditations, benefits
- Gathering information to help build confidence and knowledge before and during the interview
- Reviewing job vacancy information to support planning and identify key themes

## **Planning and organisation**

- Pre-interview planning, e.g. clothing, transport, route, resources
- Plan the information they will share, e.g. formatting of information, highlighting important points
- Reviewing application documents to plan for potential questions and strengthen responses

## **Communication**

- Communicating effectively and explaining own point of view
- Listening and responding
- Answering questions and presenting information accurately

## **Self-improvement**

- Planning for self-improvement, e.g. reflect on own interview performance, highlighting areas for development, recognising strengths and weaknesses

## Assessment Criteria

<p><b>Learning aim A: Understand how to plan and prepare for interviews</b></p> <p>Evidence must include:</p> <p>Reasons for using an interview, for both the candidate and the organisation, and the possible style and format of the interview for at least four different types/environments/settings. Evidence must also include descriptions of the key elements that a candidate should consider before, during and after the interview in order to be fully prepared, give a good account of themselves and seek feedback that they can use in the future.</p>
<p><b>A.P1</b> Outline the potential rationale, style and format of different interviews</p>
<p><b>A.P2</b> Describe the key elements you would need to consider before, during and after an interview</p>
<p><b>Guidance for assessors</b></p>
<p><b>For A.P1</b> Learners should outline the potential reasons for and style and format of different types of interview, using a variety of settings and/or environments to illustrate their understanding. This may include interviews that take place using different methods, e.g. face to face, online, telephone and/or various formats, such as panel, group, assessment day</p>
<p><b>For A.P2</b> Learners should describe key elements that would be considered prior to attending an interview, including logistics (where, when, etc.) and interview specific elements (possible questions, etc.). Learners must describe the key elements to consider during the interview (body language, verbal communication, etc.) and after the interview (seeking feedback, etc.)</p>
<p><b>Learning aim B: Participate in an interview</b></p> <p>Evidence must include:</p> <p>An action plan that includes steps the learner might take: before the interview to prepare fully, during the interview to give a good account of themselves and after the interview to reflect and learn from the experience. Evidence of the learner's ability to perform during the interview may be in the form of a filmed or voice recorded exchange, a written transcript of the interview or written notes that evidence the answers given. Learners should also produce evidence that they have reflected following the interview, identifying what they learned from the experience and how they will use this going forward.</p>
<p><b>B.P3</b> Plan and prepare for an interview</p>
<p><b>B.P4</b> Participate in an interview</p>

### Guidance for assessors

**For B.P3** Learners should plan and prepare for an interview, carrying out pre-interview research into the organisation and role/opportunity by using the job/opportunity description, person specification and any relevant websites. They should produce an action plan that includes the steps they will take to ensure they are fully prepared before, during and after the interview. Learners will consider likely questions and undertake appropriate preparation to be able to provide effective answers, this may include reflecting on their own skills, knowledge and experience, as well as suggesting ways they may deal with future scenarios. Learners will also consider their actions after the interview, including seeking feedback and identifying how they might act upon it as appropriate

**For B.P4** Learners should be able to take part in a real or simulated interview, taking necessary steps before, during and after to ensure they can present themselves in the best possible light, maximise their chances of a successful outcome and use the occasion to learn for the future

## Delivery guidance

It is recommended that practical activities are used in the delivery of this unit to help learners develop both essential knowledge and skills. The following are suggestions for activities and workshops that can engage learners and be used in preparation for the final assessment. These are not intended as a definitive guide to cover the full GLH of the unit.

### **Activities: Introduction to unit**

Tutor-led activity to introduce the requirements of the unit, including purpose, ways of working, expected personal learning outcomes and assessment methods.

**Suggested time:** about 1 hour

### **Activities: How to get on the shortlist**

The tutor discusses how employers use shortlists to reduce the number of candidates they will invite to interviews/assessments.

Learners discuss the importance of getting down to the shortlist, what strategies they can adopt and what might help them to stand out from others. The tutor can make links to other employability areas, such as applying for jobs, ensuring CVs and covering letters match requirements.

Learners could be given a list of potential applicants for a chosen job and be asked to shortlist them based on different criteria. Learners should work in small groups to shortlist and provide justification as to their decisions.

Learners reflect on the challenges of shortlisting and identify ways that they could screen or assess applicants to make shortlisting easier. Tutor to explain the process of shortlisting candidates and the methods employers use, such as screening calls, online assessments, informal chats and application requirements.

Learners to use online job sites to search for different jobs and identify the shortlisting methods used by employers. Learners should then discuss why the employer is using that particular method, what is its purpose?

Learners could take part in mock screening calls and online assessments that they have identified using research.

**Suggested time:** about 3 hours

**Activities: Different types of assessment**

Learners research the different types of assessment methods used in the interviewing process; they should cover areas such as psychometric testing, assessment centres, presentations and group activities.

In groups, learners will select one assessment method and create a short presentation on the advantages and disadvantages. Learners will then present their work to the group to share knowledge.

Learners complete a practice psychometric test, they could be given a range of different ones to complete, e.g. personality, numeracy, verbal reasoning, situational judgement. They then feed back to the group on their experience.

Learners should research the types of group activity used in interview assessments and create their own group activity assessment. Learners should then complete another groups assessment and receive feedback on their performance.

**Suggested time:** about 3 hours

**Activities: Types of questions**

Learners to be asked to research different types of questions that may be asked and give examples of them; this activity to be completed in groups and the groups provide feedback on their findings. Types discussed include biographical, technical, competency and scenario.

Tutor to provide learners with a bag of questions. Learners to work in small groups to separate the bag of questions into their types. Where learners are unsure of question types, the tutor should discuss and explain further.

Learners could be shown a series of videos of interviews so that they can identify different questions and consider those that they would find challenging or easy to answer and feed back.

Learners should create a list of ten interview questions for a given job and use these to ask other learners and record their answers. Learners could then give feedback to each other on the way they answered questions and make suggestions for further improvement.

Tutor to explain the use of scenario questions and the reason employers use them in interviews. Learners to be given a scenario question to answer in writing as a reference.

**Suggested time:** about 3 hours

**Activities: Understanding the organisation**

Learners to be asked what type of information would be useful to know about the organisation, the focus should be useful information for an interview and include such areas as size, mission, ethos, recently launched products or initiatives, place and status in their industry/sector market, links to other organisations such as charities, and recruitment procedures. They should be asked about different sources they could obtain the information from, this could include social media (LinkedIn, Facebook, Twitter, etc.), blogs, websites, news articles, company review sites (Trustpilot, Trip Advisor, etc.), Companies House, company webinars.

They should be asked to research different companies they are interested in working for and see what they can find out about each. A challenge should also be set to produce the most unusual fact they have found out about an organisation.

**Suggested time:** about 3 hours

**Activities: Preparing answers to questions**

The tutor devises a range of different questions and uses these as an opener to the session to recap on learning.

Learners prepare three questions that they would ask someone if they were interviewing for a job. Learners then take part in 'speed interviews' rotating around to ask each other their three questions within 1 minute. Learners will reflect on the activity and the challenges of thinking and responding quickly.

Tutor to explain the importance of planning answers and being prepared for interview questions. Learners to contribute ideas as to the benefits and drawbacks of preparing answers to interview questions.

Learners should research questions that are related to their own sector of interest and create a cheat sheet of questions and their responses to review in preparation for interview.

They should be encouraged to provide some reflection on the activity.

**Suggested time:** about 3 hours

**Activities: First impressions**

YouTube videos shown to learners to display different people attending interviews. Learners to reflect individually on what their first impressions are of each candidate. Learners to discuss their thoughts following the videos and compare with others.

Tutor to explain the importance of first impressions both in interviews and in general. Tutor to ask learners to step outside of the classroom and give them a scenario and persona, learners to enter the classroom role playing the persona. Other learners will then discuss the impression and what impact it has on their decisions and thoughts.

Learners to work in small groups and rotate around flipcharts in the classroom to identify what gives a positive first impression in relation to body language, personal presentation, communication and preparation.

Individually, learners will create a cheat sheet for first impressions at interview for their own reference. Learners should think about body language, personal presentation and communication.

**Suggested time:** about 2 hours

### **Activities: Preparing questions to ask**

The tutor asks the general information they may require when being interviewed, hours, breaks, facilities, holidays, training and progression opportunities when they will know the result of the interview.

Learners to generate a list of questions that could be asked at the end of the interview and suggest what the question might show an employer: you are keen, you want to progress, you already know some information but want to know more, you are interested, etc.

Learners should work in pairs to identify specific questions that they may want to ask at interview that link to their potential career path.

Learners then create a list of questions that are suited to their own career path and interests. Learners could then use this list as a reference point for interview preparation in the future. Learners may wish to share some of their questions in group discussion to support other learners.

Tutors discuss and review the questions giving support and feedback where required.

**Suggested time:** about 3 hours

### **Activities: Presentations**

The tutor explains that interviews could involve a presentation or a pitch to the interviewer or panel. Tutor to discuss the reasons why these methods might be used in an interview and asks learners who would feel confident delivering a presentation in interview.

Video clips from pitches and presentations could be used to showcase both weak and strong performances from candidates in different settings. Learners should discuss the points that they learn from reviewing other people's performances.

Learners asked to develop and present a short presentation about their chosen sector or job. The presentation should then be delivered to a small group of learners who will provide feedback. Alternatively, presentations could be recorded by the learner and then reviewed by the whole group.

**Suggested time:** about 3 hours

**Activity: Online interviews**

Learners discuss why online interviews may be used and the different platforms that could be used. Tutor will display each identified platform on flipcharts. Learners will then move around the flipcharts and contribute their thoughts on the advantages and disadvantages.

Tutor-led activity exploring the advantages and disadvantages of online interviews with a particular focus on barriers, including technology limitations, need for equipment and interruptions.

A YouTube video could be used to show learners an online interview. Learners would then review the performance of the interviewee and suggest ways that they could improve as well as identifying some of the strengths demonstrated.

Learners create a questionnaire to find out what makes people nervous or worried about online interviews. They should use their research to create an online interview help sheet for their own reference and to help others.

Tutor to provide learners with a case study for a person having an online interview. Learners to work in small groups to discuss the case study and develop a series of suggested ways that the person could prepare for their online interview and minimise any barriers or potential issues.

Learners to independently create a checklist or prep sheet that they can follow if they ever had a mock interview. The tutor could review individual learner work and provide feedback or questioning to enhance the work.

Learners could finally run a mock online interview with a peer using a platform of their choice, recording the interview so that they can review their performance and provide feedback.

**Suggested time:** about 3 hours

**Activity: Preparation for assessment**

The tutor reminds learners of the requirements of the assignment brief and answers any further questions that learners may have.

Learners take part in a practise interview before the assessment using the notes they have prepared from the previous activities and gain feedback from the interviewer and an observer to help them develop their skills further ready for the assessment.

They should be encouraged to give some self-reflection on the activity ready to review their performance after the assessment.

Group recap on key unit concepts and topics with the tutor using direct questioning to challenge learners and check understanding.

**Suggested time:** about 2 hours

**Activity: Post assessment**

Learners will take part in a group discussion to highlight the key points from the unit and how these can be used for their future progression.

Learners reflect on the notes they have produced from reference documents. They summarise what they have gained from the unit and how this will help them with their progression.

**Suggested time:** about 1 hour

## **Suggested assessment activity**

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set duration in which to complete the activity. The activity below is a suggested example. Centres are encouraged to design their own assessment activities based on the interests of the learner and the resources available locally.

### **Task**

Your task is to demonstrate your ability to prepare for and take part in an interview for a selected job role.

You will research a range of different interviews to explore the format and style used within different sectors and the reasons for these choices.

You will then need to use your research to plan for an interview, considering the key elements you need to prepare for before, during and after the interview.

Finally, you will participate in an interview with an unfamiliar person(s) for a selected job role and reflect on the feedback provided to develop your performance

### **Retake**

The learner could explore a different sector to consider the format and style of interviews used and participate in a different interview for an alternative job role.

# **Unit 5: Celebrating Equality and Diversity in the Workplace**

<b>Level:</b>	<b>2</b>
<b>Guided learning hours:</b>	<b>35</b>
<b>Total unit time:</b>	<b>35</b>

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## **Unit in brief**

The aim of this unit is for learners to identify ways to promote equality and diversity in employment.

## **Unit introduction**

There is a variety of differences between people, including race, ethnicity, gender, age, sexual orientation, culture, physical abilities and disabilities. It is important whatever the differences that individuals at work are treated equally and given the same opportunities. In this unit you will explore equality legislation and examine how it can support individuals in the workplace. You will also explore diversity, why it is important to embrace differences and why having a diverse workforce can benefit organisations and their customers as well as employees.

## Unit summary

Learning aim	Summary of suggested assessment evidence
<p><b>A</b> Examine the importance of equality and diversity in employment settings</p> <p><b>B</b> Present ways to support equality and diversity in the workplace</p>	<ul style="list-style-type: none"> <li>• Written documents, digital voice recording, filmed presentations, findings from case studies or other evidence that shows the learner can meet the assessment criteria</li> </ul>

## Key teaching and learning areas

Key teaching areas include:	
Knowledge	Skills
<ul style="list-style-type: none"> <li>• Equality and diversity in the workplace</li> <li>• Understand how to promote equality and diversity in the workplace</li> </ul>	<ul style="list-style-type: none"> <li>• Research</li> <li>• Self-reflection</li> <li>• Communication</li> <li>• Self-improvement</li> </ul>

## **Unit content**

### **Approach (how the learner should approach this unit)**

#### **Learners will need to:**

- Recognise the benefits of diversity within employment and within society
- Appreciate the impact that equality has in the workplace and within employment
- Recognise and respect other people's opinions and skills when working as a group and embrace others' differences
- Share information with others in appropriate ways
- Use persuasive skills to encourage others to think about adapting their approaches to others

### **Knowledge**

#### **Equality and diversity in the workplace**

- The meaning of equality, diversity and inclusion
- Equality Act and the protected characteristics: age, gender, disability, transgender, marriage/civil partnership, sexuality, race, religion/belief, and pregnancy/maternity
- Types of equality, e.g. political, social, legal, natural and economic
- The importance of equality and how it supports and protects employees
- The importance of diversity including the focus on individuals rather than groups
- The benefits of equality in the workplace, e.g. people feel valued, employees feel secure and happy, creates a positive environment, creates positive relationships between people, reduces staff turnover
- The benefits of diversity in the workplace, e.g. different opinions and experiences, greater skills, improved innovation and creativity, offers unique viewpoints, encourages more customers, enhances organisational perspectives

#### **Understand how to promote equality and diversity in the workplace**

- Recognising, preventing and challenging bias and discrimination
- Types of policy and procedure that enhance equality and diversity
- The benefits of workplace campaigns and promotional materials on the positives of equality and diversity
- The importance of respecting others and treating people fairly

## **Skills**

### **Research**

- Researching legislation and legal information through government sources
- Gathering information linked to equality, diversity and inclusion in the workplace
- Reviewing research findings to support identification of key themes and relevant information

### **Self-reflection**

- Self-reflection, e.g. considering own personal identity, background and influences

### **Communication**

- Communication skills explaining own point of view, listening, asking and answering questions, presenting information
- Challenging negative opinions and inappropriate communication
- Sharing opinions appropriately and respectfully

### **Self-improvement**

- Planning for self-improvement, e.g. respect for others and their differences

## Assessment Criteria

### **Learning aim A: Examine the importance of equality and diversity in employment settings**

Evidence must include:

A summary of legislation relating to equality and diversity and how it applies to the workplace. An evaluation of the positive and negative impact of issues affecting equality and diversity in the workplace. A description of how equality and diversity promotion may benefit employers and employees and its application. These should be presented in a format of choice.

**A.P1** Provide a summary of legislation protecting equality and diversity in employment law

**A.P2** Consider the positive and negative impact of issues affecting equality and diversity on employers and employees

**A.P3** Describe ways in which equality and diversity promotion may benefit employers and employees

### **Guidance for assessors**

**Please note tasks may be completed holistically**

**For A.P1** Learners should consider the key aspects of employment law that relate to equality and diversity in the workplace. They should review equality legislation and compare this to employment law to provide a detailed summary of legislation that protects equality and diversity

**For A.P2** Learners should consider both the positive and negative impact of issues affecting equality and diversity in different workplaces. Learners should review case studies to support their work

**For A.P3** Learners should describe the benefits to employer and employees of promoting equality and diversity in the workplace giving clear examples

### **Learning aim B: Present ways to support equality and diversity in the workplace**

Evidence must include:

A campaign to raise awareness of equality and diversity presented in a format of choice.

**B.P4** Produce and present in a format of your choice a campaign to raise awareness of equality and diversity in the workplace

### **Guidance for assessors**

**For B.P4** Learners should participate in a campaign to raise equality and diversity in the workplace. This can be completed as a group activity but there must be clear evidence of individual contribution, and evidence of campaign materials.

## Delivery guidance

It is recommended that practical activities are used in the delivery of this unit to help learners develop both essential knowledge and skills. The following are suggestions for activities and workshops that can engage learners and be used in preparation for the final assessment. These are not intended as a definitive guide to cover the full GLH of the unit.

### **Activities: Introduction to unit**

Tutor-led activity to introduce the requirements of the unit, including purpose, ways of working, expected personal learning outcomes and assessment methods.

Learners are asked to research the definitions of equality, diversity and inclusion and the tutor briefly gives an overview discussing the difference.

**Suggested time:** about 1 hour

### **Activities: Introduction to equality**

Learners are asked what they think equality means in the workplace and what they think equal opportunity in the workplace looks like.

Tutor to ask learners to identify the nine protected characteristics that are covered by the Equality Act. The tutor then confirms and summarises the areas that are covered by the legislation.

Learners are asked which groups are covered under the legalisation and why the groups may be disadvantaged in the workplace.

Learners to consider each of the characteristics and identify one way that an individual could be disadvantaged in the workplace because of their characteristic. Learners may also wish to research inequality in the workplace.

The tutor summarises and informs the learners of the different protective characteristics and how these have been developed and reviewed over the past decade.

**Suggested time:** about 2 hours

### **Activities: Equality**

Tutor to explain the historic issues that have been raised in regard to equality, providing the learners with a range of examples.

Learners are asked to research one historic employment case concerning equality, such as the female Ford workers at Dagenham, and present their research in a presentation to the rest of the group.

Learners will discuss how legislation has changed over time to improve conditions for certain groups and why these historic changes have changed views on equality and helped to bring a fairer approach to working practices and protect groups.

Learners will then view some more recent case studies and discuss, these can focus on groups that were not part of the legalisation until more recently, such as those with a disability and gender reassignment; the tutor emphasises that legalisation is continually evolving to protect employees and to ensure equality in the workplace.

The tutor explains that people do not always fit into a group, and it is also important to consider individuals and their differences which will lead to discussions on diversity in later activities.

Learners to be given case studies of employees who have experienced disadvantage in the workplace. Learners to work in pairs to identify if the disadvantage is linked to a protected characteristic and what the outcome should be.

Guest speaker from an HR company or ACAS to discuss the importance of equality and equal opportunity in employment.

Learners will create an individual cheat sheet of the key points of equality and the protected characteristics for reference.

**Suggested time:** about 5 hours

### **Activities: Factors that make us different**

The tutor explains that everyone sees things differently and asks why this might be. Tutor to demonstrate by asking learners to look at an optical illusion and say what they see – people will see different things.

The tutor then leads into a discussion about how culture, background and experience all have an influence on the way we see the world. Some differences may be visible and some non-visible.

Learners are asked to research different famous people and summarise how their success has been influenced by their culture, events in their life; background examples could be footballers (Marcus Rashford – child food poverty), Paralympians (Baroness Tanni-Grey Thompson – peer) or entrepreneurs (Richard Branson – dyslexia). Learners should present their findings to others in their group and discuss the positive aspects of their differences in achieving success.

Learners are then asked to think about how their background, culture and other influences have shaped the way they are. They can share their thoughts with another member of the group and then present a summary to the whole group.

Learners could think about the similarities and differences of the group and identify the factors that connect people and those that make people unique.

Learners should think about managing a team (sports, music, project, etc.) and the differences that they would want in their team members. Learners could create a team outline for their chosen activity to show the differences and justify their choices.

**Suggested time:** about 4 hours

**Activities: Benefitting from others' differing views and opinions**

Following on from the previous activity learners are asked if they have friends, family or colleagues who are very different from them but that they get along with. The learners are asked for examples and why they have respect for that person.

Learners are then asked to think of a time when they completed a group task either in a work or non-work situation, where input from one or several people put a different perspective on the task and enabled them to achieve the objective or overcome obstacles. It would be a good idea for the tutor to have their own example to start.

Learners to work in a group to complete a problem-solving activity. In the first instance only one person can share their views and opinions and others will follow, gradually the tutor should allow more people to share their views and opinions. Learners to reflect on the activity and express when it was most challenging and when it was easiest. Learners to then consider the benefits of lots of differing views and opinions and the drawbacks.

Learners to use Post-it notes to share experiences when others' views and opinions may be a negative influence or impact. Tutor to discuss with learners the importance of sharing views and opinions but making sure that they are fair and not discriminatory or negative.

**Suggested time:** about 3 hours

**Activities: Diversity**

The tutor introduces the learners to the concept of diversity, explaining that it is about recognising differences. Learners to discuss their ideas of diversity and give examples of diverse groups from their own experiences.

Learners are asked what supermarkets do to recognise their different customers. In pairs, learners will consider one of the following groups and will discuss and present how the supermarket recognises difference for that group: people with additional needs, children, customers with autism, pensioners, ethnic minorities, individuals who speak other languages, visually impaired, etc.

The tutor explains that just as there are different approaches for an organisation's diverse customer base, customers also expect the workforce to reflect diversity and be representative of the organisation's customers.

The learners are asked what benefits diversity has for customers. Discussion can include a better understanding of customer needs, language skills, being able to relate and empathise.

Learners to work in pairs to add Post-it notes to flipcharts to identify the benefits of diversity for an employer and a business. Learners could consider different skills, perspectives, knowledge of a different language including sign.

Learners to independently create a mind map or thought shower showing the benefits of diversity to the employer, the employee and the customer for any given organisation. Learners may wish to share their ideas to support their peers.

YouTube video covering the importance of diversity in the workplace to be shown to learners. Learners to reflect on the views and discuss their thoughts and opinions.

Learners are given some case studies regarding diversity including where employers have employed a diverse workforce which has helped their organisation to develop positively. Learners to reflect on the case studies and share their opinions/views about the benefit of having a diverse workforce.

**Suggested time:** about 4 hours

### **Activities: Challenging injustices**

Learners to create an anonymous survey for their peers to identify when and how people have been treated unfairly. Learners should evaluate their results and highlight the key reasons for unfair treatment. Learners should discuss how they could target these issues so that people are not treated unfairly in future.

Learners are given scenarios of individuals who have been treated unfairly because of their diversity. They discuss courses of action and how these impact on the individual.

Learners to individually create a list of rules that they would put in place in the workplace to challenge injustice, and to consider the consequences they would put in place for those guilty of injustice. Learners should share their thoughts and opinions.

**Suggested time:** about 2 hours

### **Activities: Inclusion**

The tutor introduces the learners to the concept of inclusion, explaining that it is about ensuring employees' differences are valued and employees feel valued enabling them to grow and prosper at work.

Question flipcharts are displayed in the classroom (why is it important for employees to feel valued? How does feeling valued benefit the employee? How does feeling valued benefit the employer?) Learners to rotate around flipcharts and share their thoughts and ideas on each. Tutor to discuss responses as a group.

Learners to interview family, friends and other people who work in different organisations to gather their feelings and opinions on being valued and what being valued means to them. Learners to share their findings.

Learners are introduced to the concept of neurodiversity explaining that it covers differences in brain function or alternative thinking styles, such as dyslexia, autism and ADHD. The tutor explains that, similar to the reasonable adjustments for physical disability discussed in the equality session, a lot of employers are making adjustments in the workplace to help those who function differently to others.

Learners to research different ways that employers could make adjustments in the workplace to meet the need and help individuals with additional needs or challenges. Learners should consider both physical disabilities and neurodiversity.

Learners are asked to research some examples of where employers have embraced the concept of inclusion and how it has benefitted organisations and individuals particularly for neurodiversity and share their findings with the group.

Learners should research and present different campaigns that employers or organisations have launched to improve diversity and inclusion within the workplace. Learners may reflect on their own experiences of campaigns as well as researching those launched by large organisations.

**Suggested time:** about 4 hours

### **Activities: Invited guests**

A guest speaker is invited to talk to the group, for instance, a local employer who employs a diverse workforce, an employer who has made adaptations to accommodate an employee with specific needs or an employee with specific needs who has had a positive experience in the workplace.

Learners may wish to interview (where appropriate) individuals with additional needs to explore the ways in which they would want an employer to make adaptations, or how they feel they could be made to feel more included and valued. Learners should then present their findings.

As a summary, learners should be asked to discuss the differences between equality, diversity and inclusion and state why they are all important in the workplace. They are asked why it is important to raise awareness of each area.

Learners should create a cheat sheet for their own reflection which details the meanings of inclusion, diversity and equality, and includes key points from their learning.

**Suggested time:** about 3 hours.

**Activity: Preparation for assessment**

The tutor reminds learners of the requirements of the assignment brief and answers any further questions that learners may have.

Group recap on key unit concepts and topics with the tutor using direct questioning to challenge learners and check understanding.

**Suggested time:** about 1 hour

**Activity: Post assessment**

Learners will take part in a group discussion to highlight the key points from the unit and how these can be used for their future progression.

Learners reflect on the notes they have produced from reference documents. They summarise what they have gained from the unit and how this will help them with their progression.

**Suggested time:** about 1 hour

## **Suggested assessment activity**

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set duration in which to complete the activity. The activity below is a suggested example. Centres are encouraged to design their own assessment activities based on the interests of the learner and the resources available locally.

### **Task**

Your task is to explore the importance of equality and diversity within the workplace and demonstrate your ability to promote and support equality and diversity.

You will research equality and diversity in different sectors and gather evidence of case studies that reflect the positive and negative impact of issues affecting equality and diversity. You should then use your research to create a document of your choice that summarises equality and diversity legislation and highlights the benefits to employers and employees of promoting equality and diversity.

You will then need to use your findings to support you in producing and presenting a campaign to raise awareness of equality and diversity in the workplace.

### **Retake**

Learners could consider different workplaces and sectors for research and information gathering and generate an alternative campaign using different formats.

## **Unit 6: Understanding Work-based Rights and Responsibilities**

<b>Level:</b>	<b>2</b>
<b>Guided learning hours:</b>	<b>35</b>
<b>Total unit time:</b>	<b>35</b>

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### **Unit in brief**

The aim of this unit is for learners to develop an understanding of the rights they have as an employee and the responsibilities employers have towards their employees. They will also develop an understanding of their own responsibilities in the workplace and how to apply these to situations they may find themselves in at work.

### **Unit introduction**

Employees have the right to be treated fairly in the workplace and employers must have suitable policies, procedures and processes in place to ensure legislation and guidance is adhered to and that employees are protected. Employees also have responsibilities towards their employer, colleagues and others they come into contact with in the workplace. It is also important to understand how and where to obtain support and guidance if difficulties are encountered at work.

In this unit you will investigate your rights and responsibilities and explore some of the legislation linked to them. You will also explore internal and external sources of support available if you have problems at work.

## Unit summary

Learning aim	Summary of suggested assessment evidence
<p><b>A</b> Examine workplace rights and responsibilities</p> <p><b>B</b> Analyse policies and procedures that make workplaces safe and equitable</p>	<ul style="list-style-type: none"> <li>• A summary of research undertaken for rights and responsibilities in the workplace and the legislation that supports them, presented in a format of choice</li> <li>• A summary of the sources of advice and guidance (internal and external) to support you at work</li> </ul>

### Key teaching and learning areas

Key teaching areas include:	
Knowledge	Skills
<ul style="list-style-type: none"> <li>• Rights and responsibilities that they have as an employee</li> <li>• Rights and responsibilities of an employer</li> <li>• Legislation, policies and procedures that will be relevant in a given workplace or environment</li> <li>• How different workplaces or work environments might have the same and/or different policies and procedures to follow</li> <li>• Why it is important to have workplaces which are safe and fair</li> </ul>	<ul style="list-style-type: none"> <li>• Research</li> <li>• Use of appropriate communication skills</li> <li>• Information handling and interpretation</li> </ul>

## Unit content

### Approach (how the learner should approach this unit)

#### Learners will need to:

- Recognise the importance of work-based policies and procedures for employees and employers
- Recognise the role of legislation, policies and procedures in supporting safe and fair workplaces
- Communicate with others, using active listening to be aware of and consider others' opinions
- Apply reasoning skills, e.g. using scenarios to identify issues in the workplace
- Consider how their own actions and behaviours could support legislation, policies and procedures in order to create a safe and fair workplace

#### Knowledge

##### Rights and responsibilities that they have as an employee

- Rights that they have as an employee, e.g. national minimum wage, paid holiday, breaks, to work in a safe environment, to be protected from discrimination
- Responsibilities they have to their employer and colleagues, e.g. work safety to protect others, follow employers instructions, work to the best of your ability, be honest, be punctual, follow procedures, treat people fairly

##### Rights and responsibilities of an employer

- Rights of an employer, e.g. employ and terminate employment for who they choose without prejudice, change terms and conditions of employment, have a workforce who can complete the job effectively
- Responsibilities that an employer has to their workers, e.g. provide a safe working environment, provide contracts to employees, ensure workers have correct personal protective equipment (PPE), provide workers with correct pay

##### Legislation, policies and procedures that will be relevant in a given workplace or environment

- Legislation that will be relevant in a given workplace or environment including equality, health and safety, data protection
- Policies that a given workplace will have in place
- Procedures that a given workplace will follow
- How individuals can adhere to relevant legislation, policies and procedures

## **How different workplaces or work environments might have the same and/or different policies and procedures to follow**

- How different workplaces or work environments might have the same and/or different policies and procedures to follow
- How different policies and procedures impact the workplace positively

## **Why it is important to have workplaces which are safe and fair**

- What is meant by a 'fair' workplace
- Potential safety issues in an identified workplace or environment
- Potential workplace issues, e.g. under performance, bullying, harassment, unfair treatment, safeguarding and health and safety incidents
- How individuals can support the safety and fairness of workplaces
- Sources of support and guidance to help employees, internal, e.g. line manager, HR, health and safety officer, welfare officer, external, e.g. Citizens Advice, trade unions, ACAS, professional bodies

## **Skills**

### **Research**

- Research, e.g. gathering information about legislation, rights, responsibilities at work and about policies and procedures in an identified workplace

### **Communication**

- Use appropriate communication skills to listen, ask questions and contribute within a discussion

### **Self-reflection**

- Self-reflection, e.g. considering own personal expectations, experiences and viewpoints on employee rights and responsibilities

### **Information handling and interpretation**

- Information handling, e.g. reading documents and understanding how they apply to the workplace

## Assessment Criteria

<p><b>Learning aim A: Explore workplace rights and responsibilities</b></p> <p>Evidence must include:</p> <p>An explanation of different rights and responsibilities at work, the key obligations of employers and employees under both legislation and workplace specific rules and regulations, and why these are important in the workplace generally, as well as identified workplaces/sectors.</p>
<p><b>A.P1</b> Explain the rights and responsibilities of employees and employers</p>
<p><b>A.P2</b> Consider the importance of identified workplace legislation, policies and procedures</p>
<p><b>Guidance for assessors</b></p>
<p><b>For A.P1</b> Learners will explain a range of different rights and responsibilities at work and the legislation that supports them for both employers and employees</p>
<p><b>For A.P2</b> Learners should analyse identified legislation, policies and procedures that they might find in the workplace. They should consider its importance from both perspectives: employee and employer and think about elements that are common to all workplaces (e.g. health and safety, working time regulations) as well as specific workplaces/sectors as appropriate</p>
<p><b>Learning aim B: Analyse policies and procedures that make workplaces safe and equitable</b></p> <p>Evidence must include:</p> <p>An investigation of the ways in which legislation, policies and procedures are implemented in an identified workplace or job role, and an assessment of the actions and behaviours that the learner could take, as an employee, to support a safe and fair workplace.</p>
<p><b>B.P3</b> Investigate the implementation of legislation, policies and procedures in a given work-based scenario</p>
<p><b>B.P4</b> Assess ways in which own actions and behaviour can support safety and fairness in a work-based scenario</p>

### Guidance for assessors

**For B.P3** For an identified job role, workplace or sector, learners must investigate the legislation, policies and procedures that are relevant and adhered to, including the ways in which these are implemented. This includes suggesting reasons why each may be necessary, with reference to the identified work environment and their impact on safety and fairness at work

**For B.P4** Learners should assess ways in which they, as an employee, could act and behave in order to support a workplace which is safe and fair for all employees, employers and other stakeholders. They should refer to relevant legislation, policies and procedures as appropriate

## Delivery guidance

It is recommended that practical activities are used in the delivery of this unit to help learners develop both essential knowledge and skills. The following are suggestions for activities and workshops that can engage learners and be used in preparation for the final assessment. These are not intended as a definitive guide to cover the full GLH of the unit.

### **Activities: Introduction to unit**

Tutor-led activity to introduce the requirements of the unit, including purpose, ways of working, expected personal learning outcomes and assessment methods.

A discussion on key terminology within the unit content and their meaning.

The learners could be asked to create a collective mind map of what they think are their rights and responsibilities at work, this can be referred to throughout the activities.

The tutor should explain that some of the rights and responsibilities of employees are a result of legislation and in some cases there is a specific related employment law.

**Suggested time:** about 2 hours

### **Activities: Professional conduct**

Learners to be asked to identify expectations the organisation will have of them in a work role: punctuality, reliability, timekeeping, conformance to rules and regulations, confidentiality, conducting given tasks. For each expectation, learners should discuss why these are important and the consequences for not meeting.

Learners should consider conduct outside the workplace and the effect that this can have on employment. Tutor to explain the impact of posts on social media and how these can be read by employers and others.

Tutor to provide learners with news stories of where employees have lost their job due to conduct outside of work. Learners may want to research their own examples and may want to consider famous people and how their conduct is used against them within employment.

Learners should work in pairs to identify five different behaviours outside the workplace that could bring employment organisations and industries into disrepute. Examples include committing an offence, road rage, anger with neighbours, inappropriate behaviour.

**Suggested time:** about 4 hours

### **Activities: Maintaining confidentiality**

Learners should identify their own definition of confidentiality and what it means to them. Learners should display these on Post-it notes for review throughout this section.

The tutor introduces the main legislation concerning data protection and the responsibilities of employers and employees.

Learners should make individual lists of the information that they consider to be confidential and covered under data protection. Learners should share their thoughts and discuss similarities and differences in opinion.

Tutor to explain all of the key information that is covered under data protection and provide learners with an example of the ease in which data is collected. Learners to discuss how many times they have given out personal information and not thought about their confidentiality or how their data is protected.

Groups are asked to research cases where there have been data breaches and the impact of these on individuals and organisations and discuss these with the class. Tutor to encourage reflection by asking learners to think about how they would feel if their information was released.

Learners to discuss different job roles and what types of data may be involved and the importance of keeping it safe. Tutor to identify links to performance expectations, contracts of employment and legislation.

**Suggested time:** about 3 hours

### **Activities: Respecting others at work**

Learners to create a word-wall highlighting terms and words which relate to 'respect'. Learners to discuss what respect means to them and how they would show respect.

Tutor to explain the concept of respecting others and the aspects of respect that are required within the workplace: health and safety, personal safety, social inclusion, understanding difference, etc.

Learners work in pairs to create a list of key points that they feel would demonstrate respect in work. Tutor to challenge points and encourage learners to think deeper and consider different aspects of respect.

Learners to be given a brief overview of the duty of care under health and safety. They should be asked what situations they might report to keep themselves and others safe in the workplace.

It should be discussed with learners that as in the discussion of health and safety it is important to have a duty of care towards others and ensure actions at work and outside of work both protect co-workers and ensure they do not cause them harm mentally or physically.

Learners to be encouraged to discuss use of social and safety issues and the impact of inappropriate posts on individuals.

Learners to be provided with case studies for employees who have suffered mental or physical harm in the workplace. Learners to discuss the case study and identify steps that could have been taken to prevent harm and lessons that can be learned. Learners to share their views and feed back their ideas.

Learners should research some of the initiatives that give guidance on protecting individuals and present their findings to the group; this includes guidance on safeguarding/Prevent/use of social media/bullying/harassment.

Videos may be shown for both Prevent and safeguarding, followed by discussions focusing on keeping others safe and what is appropriate to report.

Quiz-based assessment to check understanding of key terminology and concepts. Interactive platforms could be used to make the activity more competitive.

Learners to collectively create a list of workplace rules and regulations that demonstrate respect for others. Learners could research ways of demonstrating respect in the workplace or access YouTube videos to support their work.

**Suggested time:** about 7 hours

### **Activities: Rights and payments for work**

Learners to be asked to think about wages and salaries, what might be their entitlements? Learners to engage in a 'guess game' with different jobs being displayed and them guessing what wage/salary would be awarded. Learners to consider which results they were surprised by and why.

Learners should identify a range of payments including national minimum wage rates for different age groups and apprenticeships, holiday pay, maternity pay, sickness pay, pro rata payments for part time, redundancy. Learners should each select one of the payments and present three key pieces of information about the payment to the rest of the group.

In small groups, learners will research into each area and discuss both legislative requirements and good practice in the workplace.

Learners to engage in a true/false activity. Learners will be presented with statements and scenarios about payments and they will have to decide if the statement is true or false. Learners should reflect on answers and responses.

Learners should be provided with example payslips; learners should examine the payslips and identify deductions, learners will then discuss whether this is legal or illegal, sharing their ideas within a group discussion.

Tutor to explain working hours and the allocation of breaks within the working day; this should include daily, weekly and hourly rest breaks.

The tutor should link the summary to some of the key legislation in the Working Time Directive including age, opting in or out to the standards hours and main exceptions.

Learners to be given case studies for employees and will work in small groups to discuss whether or not they feel that rights, working time and pay are being appropriately met.

Learners to independently create their dream employer detailing the rights and expectations that they would have. Learners to share their ideas in small groups to identify similarities and differences and to challenge thoughts in discussion.

**Suggested time:** about 6 hours

### **Activity: Sources of support and guidance**

Learners to conduct a walk-through of their workplace to identify the different sources of information, guidance documents and support that is on offer regarding rights and responsibilities.

Tutor to explore the different sources of support and guidance that employees can access: contracts of employment/different contracts of employment handbooks/ codes of conduct/ procedures (grievance/health and safety/equality and diversity/health and safety). It can be explained that some of these may be electronic and on the organisation's website or intranet.

For each source, learners should discuss the information it could provide and its value to an employee. Tutor to question learners on the information provided in contracts of employment and learners are asked what information they would expect to be in a contract; this should include pay, hours/days of work, holidays, absence.

Learners discuss why it is important to have an agreement between employers and employees in place and the legal implications should be highlighted. Learners may wish to research situations when legal agreements have not been in place and the risks to the employee in such situations.

The learners are introduced to the role of professional bodies in industries, they could be asked to think of some of the careers they are interested in and research professional bodies that would support that career and find out what they do. Their findings should be shared with the rest of the group.

Learners should list internal staff who can provide help and guidance at work and discuss their role, examples could include HR, health and safety officer, counsellors, safeguarding or welfare staff. Learners should be allocated one specific internal staff source and produce a short presentation to highlight the support, help and guidance that they provide and their benefit to employees.

Group Q&A with an ACAS representative, or where appropriate an HR representative or employment solicitor.

The group is asked to research different external sources of help and outline what areas they can help with, discussion can include ACAS, Citizens Advice, trade unions.

Learners are given a range of different scenarios concerning issues at work and asked to determine where they would seek advice and guidance and why. Their findings should be discussed with the whole group.

**Suggested time:** about 6 hours

**Activity: Preparation for assessment**

The tutor reminds learners of the requirements of the assignment brief and answers any further questions that learners may have.

Group recap on key unit concepts and topics with the tutor using direct questioning to challenge learners and check understanding.

**Suggested time:** about 1 hour

**Activity: Post assessment**

Learners will take part in a group discussion to highlight the key points from the unit and how these can be used for their future progression.

Learners reflect on the notes they have produced from reference documents. They summarise what they have gained from the unit and how this will help them with their progression.

**Suggested time:** about 1 hour

## **Suggested assessment activity**

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set duration in which to complete the activity. The activity below is a suggested example. Centres are encouraged to design their own assessment activities based on the interests of the learner and the resources available locally.

### **Task**

Your task is to explore the rights and responsibilities of employees within the workplace and produce a summary of your findings.

You will need to analyse the rights and responsibilities of both employers and employees and consider the importance of legislation, policies and procedures in ensuring rights and responsibilities are met.

You will then apply your understanding by responding to a given scenario and presenting your response in a format of your choice. You will investigate how legislation, policies and procedures have been implemented and the impact that these have made. Finally, you will identify key issues and provide suggested solutions based on your own actions and behaviours and available sources of support.

### **Retake**

The learner could explore different working environments and employers to contrast rights and responsibilities and be provided with an alternative scenario.

# **Unit 7: Planning for Career Entry and Progression**

**Level:** 2

**Guided learning hours:** 35

**Total unit time:** 35

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## **Unit in brief**

The aim of this unit is for learners to produce a long-term career progression plan.

## **Unit introduction**

Creating a career progression plan can help you to prepare for the future and provide direction towards achieving your professional goals. For a progression plan to be useful to you, it should reflect where you are today and where you want to be in the future. It should also help you to identify short, medium and longer-term tasks to aid your career progression.

In this unit you will develop an understanding of the connection between your own skills, qualities, experience and aspirations and possible career opportunities. You will explore potential further learning and initial career opportunities, information and resources and evaluate them in terms of relevance to your own progression in order to develop a detailed career progression plan.

## Unit summary

Learning aim	Summary of suggested assessment evidence
<p><b>A</b> Compare and contrast within a selected career</p> <p><b>B</b> Plan for personal development for entry to and progression within a selected career</p>	<ul style="list-style-type: none"> <li>• A written document, digital voice recording, filmed presentation or other evidence that shows the learner can meet the assessment criteria</li> <li>• A personal development plan which includes short, medium and longer-term improvement strategies, timescales and measures of success</li> </ul>

## Key teaching and learning areas

Key teaching areas include:	
Knowledge	Skills
<ul style="list-style-type: none"> <li>• Different careers</li> <li>• How to research career entry requirements online and using other relevant sources</li> <li>• Possible entry requirements to a range of selected careers</li> <li>• Own skills, experience, knowledge and qualification relative to a range of selected careers</li> <li>• How to develop own skills, experience, knowledge and qualifications to move towards meeting the entry requirements for a selected career</li> <li>• How to develop own skills, experience, knowledge and qualifications to achieve progression through a selected career</li> <li>• Who can support this journey</li> <li>• How success could be measured</li> </ul>	<ul style="list-style-type: none"> <li>• Research career entry requirements</li> <li>• Communicate with relevant people to establish career entry requirements and/or develop skills, experience, knowledge and qualifications</li> <li>• Reflect on own skills, experience, knowledge and qualifications relevant to a selected career</li> <li>• Plan to develop skills, experience, knowledge and qualifications as required for progression within a selected career</li> </ul>

## **Unit content**

### **Approach (how the learner should approach this unit)**

#### **Learners will need to:**

- Make decisions and plan for future learning and career opportunities
- Select and record information that is relevant to the set task
- Communicate with others to find and share relevant information
- Recognise and appreciate the importance of planning in the short, medium and longer term
- Reflect on own current situation to identify individual goals
- Produce a development plan with considered timescales and long-term vision

### **Knowledge**

#### **Different careers**

- A range of different types of career, e.g. agriculture, health, education, hospitality, construction, business, arts, information technology, science, maths, law, public services

#### **How to research career entry requirements online and using other relevant sources**

- How to find relevant online resources and carry out online research

#### **What skills, experience, knowledge and qualification are relative to entry and progression in selected careers**

- The requirements for entry to a range of different careers
- The skills, knowledge, experience and qualifications that may be required for progression within a range of different careers
- Skills required, e.g. general skills, teamwork, communication, problem solving, numeracy, literacy, specific skills for the role, such as digital skills for IT roles or organisational skills for business administration
- Experience required, e.g. previous work in a similar setting or organisation, experience of working in a team, experience of dealing with customers, specific experience, such as presenting to others for teaching or experience in a care setting for health and social care
- Knowledge required, e.g. health and safety, policies and procedures, professional requirements, knowledge of the sector, trends, changes

- Qualifications required, e.g. BTEC, A level, degree, industry training and certification, specific qualifications, such as a barista award for hospitality or first aid for construction

### **Who can support this journey**

- Where to go to seek further information, advice and guidance
- How to develop appropriate questions to find relevant information regarding career entry requirements from stakeholders, e.g. questionnaires, question and answer session, email, phone call
- How to produce a planning document that includes clear steps to get from a current situation to a hoped-for future position

### **How success could be measured**

- How to set realistic, achievable and time-bound goals
- How to plan in the short, medium and longer term
- Who can help to achieve planned goals
- How to measure success

## **Skills**

### **Research career entry requirements**

- Research the entry requirements for a range of identified careers, e.g. finding appropriate online resources

### **Communicate with relevant people to establish career entry requirements and/or develop skills, experience, knowledge and qualifications**

- Communicate with relevant people to find and share information about careers

### **Plan to develop skills, experience, knowledge and qualifications as required for progression within a selected career**

- Reflect on own experience, knowledge, skills and qualifications in relation to the entry requirements for a specified career
- Plan the short-term steps required to move effectively from a current situation to a hoped-for future position
- Plan the medium and longer-term steps that will support desired progression through a selected career

## Assessment Criteria

### **Learning aim A: Compare and contrast entry and progression requirements for a range of careers**

Evidence must include:

An exploration of the different entry requirements, such as knowledge, skills, experience and qualifications, for different careers, considering why these requirements may be necessary and comparing and contrasting the requirements for each identified career. Evidence must also include descriptions of potential progression routes through the selected careers, from entry level upwards.

**A.P1** Compare and contrast the entry requirements for a range of different careers

**A.P2** Describe potential progression routes relevant to a range of different careers

### **Guidance for assessors**

**For A.P1** Learners could explore a range of different careers. They can research online and/or use other relevant sources (trade magazines, speaking to people in that role etc.) to establish likely entry requirements for different careers. These may include formal qualifications, experience, skills and knowledge. Learners should also explain why they think the highlighted entry requirements may be necessary for these careers, comparing and contrasting the entry requirements to highlight similarities and differences

**For A.P2** Learners could research (using appropriate sources) possible progression routes through their three selected careers, including changes to skills, knowledge, experiences and qualifications that might be necessary to support progression along the career pathway. Learners should describe these progression routes, considering why it may be necessary for requirements to change/increase in line with career advancement

### **Learning aim B: Plan for personal development for entry to and progression within a selected career**

Evidence must include:

A personal development plan which includes reflection on own current knowledge, skills, experience and qualifications and highlights strategies that can be used to fill gaps and develop weaker areas relating to these elements, relevant in the short term for entry to and in the medium and longer term to progression within an identified career.

**B.P3** Create a personal development plan for entry to and progression within a selected career

### Guidance for assessors

**For B.P3** Learners should create a personal development plan that highlights their own current skills, knowledge, experience and qualifications relevant to their selected career. Learners should consider how gaps and/or areas in need of development can be addressed in the short term (e.g. how they could gain additional experience and/or knowledge, improve relevant skills, identify courses or qualifications), setting themselves timescales and identifying who may be able to support them. Learners should also outline how they plan to develop skills, knowledge, experience and qualifications that could support career progression over the medium and longer term, with reference to their previous findings regarding career progression routes

## Delivery guidance

It is recommended that practical activities are used in the delivery of this unit to help learners develop both essential knowledge and skills. The following are suggestions for activities and workshops that can engage learners and be used in preparation for the final assessment. These are not intended as a definitive guide to cover the full GLH of the unit.

### **Activities: Introduction to the unit**

Tutor-led activity to introduce the purpose and requirements of the unit, including ways of working, expected personal learning outcomes, assessment methods and ground rules to ensure open and safe discussions.

Tutor-led activity on what we mean by progression planning, e.g. identifying goals and targets based on our interests and the steps we need to consider towards achieving these.

Tutor-led whole group activity on aspirations – compiling a collective list of ‘where we would like to be in 5 years’ time’, considering personal relationships, jobs and careers or engagement in learning and training.

**Suggested time:** about 2 hours

### **Activities: Self-assessment**

Tutors discuss the importance of the role played by factors such as a positive self-image and attitude, adaptability and the ability to cope with change.

In group discussions, learners could consider the importance of personal skills and qualities that enable career progression. For example, motivation, determination, flexibility, empathy, respect for the beliefs or opinions of others and the desire/ability to learn new skills. Learners should create lists of skills and qualities that they possess as individuals and identify those they need to improve.

A range of self-assessment tools should be used to ensure learners arrive at a balanced conclusion about their qualities, skills and attributes. Learners should be provided with suitable links to online self-assessment tools and assessments to complete.

Learners could work with a careers adviser, have one-to-one discussions with tutors and others to gain a balanced set of feedback on their own skills, qualities and strengths.

**Suggested time:** about 3 hours

### **Activities: Getting started**

Learners need to be introduced to a variety of next steps and careers information which they can use to research, clarify and review their progression choices.

Learners should be encouraged to consult a wide variety of resources, such as the internet, local and national publications, careers advisers, job centres and people from the world of work.

Learners should be encouraged to draw on information contained in prospectuses, websites, skills and interest self-assessments, job profiles, articles in magazines, trade and professional journals, newspapers, employment agencies, information from professional bodies and conclusions from conversations with peers, relatives, past and present employers and tutors.

The importance of recording achievements on a regular basis, reviewing targets regularly and making changes as necessary could be introduced to learners through a whole group discussion. The tutor could timetable regular review dates for learners.

Learners should individually create a self-management plan to schedule their job searching activities to support their progression and awareness of sector changes.

**Suggested time:** about 2 hours

### **Activities: Job and career motivators**

Reviewing initial career choices. Building on the 'where are you in 5 years' activity. Learners to consider reasons behind their interests: job satisfaction, social status, money and position, peer and family factors. Learners could produce a list and grade them. Learners to share their lists and discuss similarities and differences.

Tutor-led discussion activity, the aim of the activity is to explore learner perceptions of future potential job roles and raise awareness of some realities of progression and employment. Tutor may use an interactive quiz to highlight myths and realities in a true or false activity.

Small groups are presented with a range of cards with job roles, such as performer, teacher, nurse, doctor, solicitor, chef, blogger, DJ, shop assistant, IT technician, childminder. The groups are then given a range of descriptive cards outlining average salaries, day-to-day work tasks, qualifications needed, working hours and conditions and asked to match to the likely job roles.

As part of this learners are shown videos of people in those careers to see what motivated them or has turned them away from these careers.

Learners to individually reflect on their learning and share their thoughts and ideas with others.

**Suggested time:** about 4 hours

### **Activities: Finding out about progression opportunities (short-term planning)**

Tutor to explore different opportunities for progression, volunteering, work experience, part-time work, apprenticeships, further education. Learners to discuss the pros and cons of each method.

Small group discussion about the benefits of work experience and volunteering. This may include increased self-esteem or self-confidence; sense of achievement; understanding the law in relation to work; career opportunities; further training available; new skills; making new friends; tackling new activities, developing skills needed for employment; understanding how activities benefit the community.

Guest speakers such as personnel from the tutor's place of work, employers, careers specialists and local volunteer coordinators could be invited to talk about opportunities available in learning and work. Employers offering apprenticeships and other recruiters also talk about their work opportunities.

Learners should be directed to the numerous websites which refer to relevant opportunities. Learners should identify potential opportunities that they would want to pursue and collect relevant information. Learners should be encouraged to contact potential employers or visit employers to gather more information.

Using a timeline of 6 months, 1–2 years and 5 years, learners should work independently to plot their personal progression.

Learners should present their timeline of personal progression to the rest of the group to create a group timeline. Learners should provide peer feedback where goals are unrealistic, or where learners feel that others should aim for more.

Learners to present a final timeline of personal progression and consider steps that they could take to ensure they meet their aims.

Learners should practise interviewing each other to gain experience and feedback on how they perform. The tutor could also interview learners to support their progression.

**Suggested time:** about 5 hours

### **Activities: Longer-term career planning**

Tutor-led discussion to explain stages in career development: how one job role or stage of career development may lead to another; ongoing nature of career progression; building skills and knowledge as an ongoing process; moving up through organisational structure; increasing understanding of a task or skill from basic to more advanced level; learning new skills could lead to new job role; taking on new responsibilities voluntarily could lead to paid promotion.

Learners work in groups using case studies of different career pathways to note entry requirements, progression routes, ways of combining different qualifications and different styles of learning and assessment. Learners should record any information which is relevant to their own career pathway.

In small groups, learners consider various forms of work and study opportunities, e.g. part-time studies or courses, courses or studies subsidised or paid for by an employer, full-time studies/courses, online courses, promotional opportunities at work, training and personal development opportunities, work shadowing and cross-company projects.

In small groups, learners will explain the career benefits of work or study opportunities, e.g. learn new skills, gain a qualification, improve status or reputation, fit in with lifestyle, fit in with schedule, fit in with childcare responsibilities, potential for pay rise or improvement in employment prospects.

Group discussion on the topic of 'a job for life' – how likely is it that we will remain in one job throughout our working lives? What factors or situations may occur that mean we need to change jobs/careers? How do we identify the transferable knowledge and skills we have and apply them to other roles? How would you change your plans?

Learners to review their personal progression timeline. Learners should make any changes required following the session and discuss long-term plans and goals with their peers.

Learners could create vision boards using images to show their long-term aims and goals as an aid for focus and self-motivation.

**Suggested time:** about 6 hours

### **Activities: Skills, behaviours and attitudes for study and work**

Discussions on the expectations of tutors, trainers and employers, e.g. being punctual, following instructions, meeting task deadlines, asking for help when needed, communicating and negotiating where issues arise.

You are hired! Learners could respond to scenarios or role play interviewing candidates for a part-time local job or compare application forms to decide who the best candidates are.

Learners to work in small groups to discuss how people can ensure that they sustain the course or job. Learners should consider how behaviours, attitudes and skills may help or hinder keeping on course or sustaining a job. Examples to consider include:

- Behaviours, e.g. reliable, collaborating, welcoming, accepting of others, hard-working, dedicated, committed, enthusiastic and willing to learn, open-minded.
- Attitudes, e.g. positive, self-starting, can do, look at the bigger picture, if something is worth doing it is worth doing well, never give up, do not put off until tomorrow what you can do today.
- Skills, e.g. listening, checking for understanding and clarifying instructions, action planning, teamwork, delegating; coordinating teamwork, problem solving, reporting, dealing with group dynamics, personal organisation, decision making, taking calculated risks, management, leadership, networking.

Learners to work in pairs to apply learning to the context of study and being on an apprenticeship or university course. Learners should create a mind map to show what skills, qualities or attitudes are needed to sustain the place, what could happen that would result in being removed from the course and what actions they could take to progress from this.

Counter discussions on where positive situations occur, e.g. receiving praise, promotion opportunities, gaining good grades and feedback that help with our sense of achievement.

Learners to be given case studies of employees who are struggling to sustain their employment or education course. Learners to discuss in small groups the steps that could be taken to resolve the situation. Learners to feed back to whole group.

Learners to work as a group to discuss the meaning of terms such as going the extra mile, giving 110% and a good team player.

**Suggested time:** about 6 hours

#### **Activity: Preparation for assessment**

The tutor reminds learners of the requirements of the assignment brief and answers any further questions that learners may have.

Group recap on key unit concepts and topics with the tutor using direct questioning to challenge learners and check understanding.

**Suggested time:** about 1 hour

#### **Activity: Post assessment**

Learners will take part in a group discussion to highlight the key points from the unit and how these can be used for their future progression.

Learners reflect on the notes they have produced from reference documents. They summarise what they have gained from the unit and how this will help them with their progression.

**Suggested time:** about 1 hour

## **Suggested assessment activity**

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set duration in which to complete the activity. The activity below is a suggested example. Centres are encouraged to design their own assessment activities based on the interests of the learner and the resources available locally.

### **Tasks**

Your task is to develop a detailed personal development plan that identifies the steps needed to help you towards achieving your desired outcome.

You will need to research a range of different careers available to you to compare the entry requirements and how you fulfil these. You will need to consider the range of opportunities available to you in the short, mid and long term and explore potential progression routes that you could follow.

You will then need to use your findings to support the creation of a personal development plan that highlights skills, knowledge, experience and qualification and outlines the planned improvement of gaps to enter and progress within a selected career.

### **Retake**

The learner could explore a different range of career options, progression routes and requirements, and develop an alternative personal development plan.

## **Unit 8: Applying Literacy in the Workplace**

**Level:** 2

**Guided learning hours:** 35

**Total unit time:** 35

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### **Unit in brief**

The aim of this unit is for learners to use a range of literacy skills effectively for workplace activities.

### **Unit introduction**

Employers value employees who are confident using different literacy skills and willing to improve them on an ongoing basis. Using literacy skills effectively can help you learn more easily and gives you greater opportunities to progress in the work environment. It is therefore important that you know how to demonstrate and improve those skills.

In this unit you will have the opportunity to be involved in different work-related tasks that require you to use several literacy skills in order to achieve the task.

## Unit summary

Learning aim	Summary of suggested assessment evidence
<p><b>A</b> Understand the importance of literacy in the workplace</p> <p><b>B</b> Select and use literacy skills effectively in work-related tasks</p>	<ul style="list-style-type: none"> <li>• A written document, digital voice recording, filmed presentation or other evidence that shows the learner can meet the assessment criteria</li> <li>• Filmed or voice recorded exchange, written transcript of a role-play scenario or written notes of evidence that was seen and heard</li> </ul>

## Key teaching and learning areas

Key teaching areas include:	
Knowledge	Skills
<ul style="list-style-type: none"> <li>• Work-related literacy skills and tasks</li> <li>• Uses of literacy in the workplace</li> <li>• How and why being literate is important in the workplace</li> <li>• How the uses of literacy might change from one workplace to another</li> <li>• What makes literacy effective</li> <li>• Extracting information from text</li> <li>• Checking and understanding key words</li> <li>• Ways to check accuracy in text</li> <li>• How to use clear, concise verbal communication</li> <li>• How and why to ask questions to check understanding or gain clarification</li> <li>• How to write clear, accurate text</li> <li>• How to select and use formats that are appropriate for the reader</li> </ul>	<ul style="list-style-type: none"> <li>• Communicate and work with others</li> <li>• Write text that is clear, uses punctuation appropriately and provides relevant information</li> </ul>

## Unit content

### Approach (how the learner should approach this unit)

#### Learners will need to:

- Demonstrate literacy skills relevant to work-related tasks
- Recognise the importance of literacy in the workplace, including possible negative consequences of not having appropriate literacy skills
- Communicate effectively with others as part of a team
- Select and use effective communication skills and methods with others to find and share relevant information
- Select and record information that is relevant to the set task

#### Knowledge

#### Work-related literacy skills and tasks

- Work-related literacy skills, e.g. speaking, listening, communicating, writing, reading
- The importance of good literacy skills in the workplace
- The impact of not having effective literacy skills in the workplace
- Following written instructions to complete a task, e.g. making up animal feeds, preparing a room for a meeting, preparing and cooking ingredients
- Reading work guidelines, signage, internal news bulletins
- Reading instructions to produce a product
- Preparing a notice for a meeting that contains relevant information, e.g. meeting title, date, time, venue, main topics to be discussed
- Welcoming customers, asking questions, listening to information, recording information, e.g. registering a customer at a leisure centre, making an appointment for a client in a hair and beauty salon, taking orders in a restaurant
- Making calls and answering the telephone, asking questions and repeating information to clarify understanding
- Following verbal instructions to complete a task, e.g. testing soil, collecting and laying out sports equipment
- Taking an active part in team meetings, e.g. sharing own opinions, making suggestions, asking questions if unsure
- Producing simple plans, e.g. preparing and cooking, planning and running an event, scheduling repairs, organising a team meeting

## **Uses of literacy in the workplace**

- Different uses of literacy, e.g. participating in discussions, following instructions, describing actions, creating documents
- How to select appropriate styles/methods for the situation and audience
- How the use of literacy might change in different sectors, e.g. customer-facing roles use more flexible, conversational literacy focusing on verbal interaction, office roles focus more on the use of literacy in writing and reading, hospitality roles require strong communication, writing and reading

## **Extracting information from text**

- Ways to identify key information from different text, e.g. knowing common words used in the workplace, highlight information on written text and computer, use visual cues

## **Checking and understanding key words**

- How to find the meaning of words using different tools, e.g. internet, dictionary

## **Ways to check accuracy in text**

- How and why it is important to use correct spelling, punctuation and grammar, e.g. full stops, question marks, exclamation marks, commas, subject-verb agreement, consistent use of tense
- How to use different ways to check accuracy in text, e.g. ask someone to read it, use the review facility on the computer, re-read the text out loud

## **Clear and concise verbal communication**

- How and why to use clear, concise verbal communication

## **How and why to ask questions to check understanding or gain clarification**

- How and why it is important to ask questions to check understanding or gain clarification

## **How to write clear, accurate text**

- How and why to write clear, accurate text

## **How to select and use formats that are appropriate for the reader**

- How to select and use written formats that are appropriate for the reader, e.g. notes, list, email, letter, blog entry

## **Skills**

### **Communicate and work with others**

- Engage with others, building relationships through body language, communication and interpersonal skills
- Ask and answer questions, e.g. open-ended questions, closed questions, leading questions
- Share own opinions and provide feedback to others
- Work with others, e.g. participating in one-to-one conversations, sharing ideas in team meetings, taking part in discussions, following instructions
- Use appropriate communication skills, e.g. reading text, writing information, listening to others
- Identify the purpose of text, e.g. provide information, share opinions and ideas, formal or informal use of language
- Identify the main points and key ideas of text by identifying key words and/or phrases
- Listen and responding appropriately to others

### **Write text that is clear, uses punctuation appropriately and provides relevant information accurately**

- Review a piece of writing, e.g. is it clear, does it use technical language, does it provide all the information needed to complete the task
- Check text is clear and accurate, e.g. using software, asking someone to read text
- Write text that is clear, uses punctuation appropriately and provides relevant information

## Assessment Criteria

<b>Learning aim A: Understand the importance of literacy in the workplace</b> Evidence must include: An explanation of the importance of literacy skills in workplaces or environments, along with a reflection on the potential negative consequences of not being able to use literacy skills effectively in the world of work.
<b>A.P1</b> Explain the importance of literacy skills in a range of work-related scenarios
<b>A.P2</b> Reflect on possible consequences of not using literacy skills accurately or effectively in the workplace
<b>Guidance for assessors</b>
<b>For A.P1</b> Learners should explain how literacy: reading, writing, listening and speaking is likely to be used in a range of ways in work environments. In order to explain effectively, learners should include both what literacy skills are and why they are important
<b>For A.P2</b> Learners should reflect on the potential impact of not being able to read, write, speak and/or listen effectively, considering different workplaces and the impact on them as an employee, for their colleagues and for the successful completion of the tasks at hand
<b>Learning aim B: Select and use literacy skills effectively in work-related tasks</b> Evidence must include: The learner demonstrating that they can select and use appropriate methods to share information linked to work-related tasks, and receive and understand information from different sources in different formats.
<b>B.P3</b> Understand complex information for a range of work-related tasks
<b>B.P4</b> Produce and share detailed information for a range of work-related tasks

### Guidance for assessors

**For B.P3** Learners should demonstrate that they can receive and understand complex written and spoken information related to work-based tasks. They should undertake work-based activities, involving both written and spoken information (either separately or together). Learners must show that they understand the information they have read and/or heard, maybe by sharing it with others and/or using it to achieve a set work-related task and/or solve problems

**For B.P4** Learners should produce their own accurate and detailed information, related to work-based task/s. They must show that they can use information, which is both written and spoken, either as separate tasks or by using both forms of literacy in the same activity

## Delivery guidance

It is recommended that practical activities are used in the delivery of this unit to help learners develop both essential knowledge and skills. The following are suggestions for activities and workshops that can engage learners and be used in preparation for the final assessment. These are not intended as a definitive guide to cover the full GLH of the unit.

### **Activities: Introduction to unit**

The tutor to begin the session by explaining the unit title and the aims of the unit. Tutors lead a discussion on the importance of being confident using literacy skills and the value employers place on workers who have good literacy and communication skills.

Working in small groups, learners identify different literacy skills that may be used in different work sectors and share their responses with the wider group.

Learners also complete a self-assessment of their own literacy skills to help them identify areas that they are confident using and skills they would like to develop further.

**Suggested time:** about 2 hours

### **Activities: Finding key information and meaning of words**

Learners to be given a series of worksheets to complete that ask them to find the key information from the text. Examples could include an email from a customer asking about the delay in a delivery, a staff notice about a new procedure for infection control or an extract from a job description.

Learners carry out an internet search for simple, straightforward information. They highlight key information using text highlight colour, underlining or shading.

Learners to be given a range of tasks that ask them to use different techniques to find the meaning of work-related vocabulary. This may include internet searches, using dictionaries, reading words in the context of the sentence. This activity can be part of the suggested tasks included for finding key information.

**Suggested time:** about 3 hours

**Activities: Presentation of written work**

Learners begin by discussing the importance of presenting work accurately. This includes ways it can influence the reader, e.g. if there are several errors it may suggest the presenter is not proud of the work they are producing.

Tutors provide different types of text that contain errors and learners can 'mark' the work. Text should include spelling and punctuation errors that change the meaning of the text. Examples should include actual examples such as external shop boards that show inappropriate use of apostrophes.

Learners create a checklist that they can use when completing a piece of work. This acts as a reminder for each piece of work that they undertake.

Tutor-devised worksheets on work-related examples that focus on checking and changing spelling, grammar and punctuation.

Learners to be given a worksheet with a chart on it to complete. The heading for each column would relate to relevant work sectors. As learners come across words relating to each sector, they could record it under the relevant heading. They then check it for accuracy.

Working in small groups, learners could 'mark' given text for accuracy of spelling, punctuation and grammar.

**Suggested time:** about 4 hours

**Activities: Reading work-related text**

The tutor gives examples of a range of workplace texts. The tutor provides a breakdown of a piece of workplace text to support the learner in recognising the language devices in the text to convey information, for example passive/active voice. Learners should be supported in finding 'hidden meanings' in the text such as 'urgent response required'.

Learners to be given different types of work-related text and asked to identify the key purpose of the information. Alternatively, learners work on tutor-devised worksheets that ask the learner to highlight and/or summarise the purpose of the text.

**Suggested time:** about 3 hours

**Activities: Preparing and following written instructions**

Working in small groups, learners to be asked to write a set of instructions for a given task, e.g. drawing the outline of a house, tying shoelaces. Each group would be given a different task to work on. The information to be given as a list using bullet points. The information is then passed to a different group who follow the instructions. The wider group can then discuss the challenges they had following instructions and make suggestions on how it could be clearer. The activity to be repeated using different tasks.

As well as written instructions and text, the tutor can use visual material, such as posters and spoken communication and ask learners to create instructions for another learner to follow. They then use group discussion to evaluate the clarity of the instructions.

The tutor also develops learners' understanding of the tone of some texts, for example an angry tone and how it may sound to an audience. This may lead to reading out loud to a group or 'sending' a fictional memo to other learners and asking for feedback on the 'effect' or responses to the text.

**Suggested time:** about 2 hours

### **Activities: Recording different types of information**

Working in small groups, learners take part in a thought shower identifying different ways of recording information, e.g. lists, forms, notes. Learners could then be given tutor-devised worksheets to identify the most appropriate way of recording information for different types of text. They discuss their suggestions as a wider group.

Learners to be given opportunities to use different recording methods. For example, the tutor reads out complex work-related instructions and learners could make notes. They then share their responses to find how accurate they were and if they had missed key information.

Tutors introduce learners to the idea of keeping a daily work diary. The purpose of the diary would not be to describe what they did but to use notes and annotated diagrams to refer back to at a later date. Learners could be encouraged to keep a daily log for a week showing key information from each class, actions they need to take, what others agreed to do and timescales involved. The learner chooses the method of presentation that they enjoy using most. At the end of the week, learners use the information in their diaries to answer questions from the tutor.

**Suggested time:** about 2 hours

### **Activities: Accuracy and clarity of information**

To help stress the importance of accuracy in the use of language for communication, the tutor can use film/video/TV/YouTube footage or drama/role play to highlight how poor use of language can impact on communication in a workplace situation.

Learners use a variety of techniques to check work for accuracy. They should be given IT files to check using spelling and grammar checks. Other activities include writing a short message and asking someone to check it for them to ensure clarity.

As a group, learners discuss why it is important to be accurate in their written work.

Learners to be given a list of instructions that are not in an appropriate order and asked to rearrange them to ensure clarity. Examples include cooking instructions, health and safety.

**Suggested time:** about 2 hours

**Activities: Listening skills**

Learners participate in a number of listening activities that are work-related, e.g. taking notes at a meeting, listening to others during a virtual meeting, asking and answering questions to show that they are listening to and understanding the information given.

Learners participate in activities that give them the opportunity to listen to other people's opinions, form conclusions and share their own ideas and opinions.

**Suggested time:** about 2 hours

**Activities: Sharing information**

Using a tutor-devised scenario and working in groups of three, a learner could share information with another member of the group. The remaining group member acts as an observer. They complete a checklist identifying if the information was clear, was it accurate, did the person ask appropriate questions. When the task is complete the group could talk about what was successful and what could be improved.

**Suggested time:** about 2 hours

**Activities: Presenting and developing work-related literacy skills**

Where possible, learners should have the opportunity to use several literacy skills on different tasks at the same time. This would reflect what happens in the work environment. Alternatively, learners gather evidence during work experience of how they used their literacy skills during the day.

Tutors provide different tasks that encourage the learner to read text from different sources, write a response, listen to others and ask relevant questions to gain information and then to share information with others. This work should be done in small groups and then shared with the wider group.

An example of a task:

- Read a brochure and gather leaflets about a well-known local tourist attraction, summarise key information and then present the information to the group.
- Read a menu card, make notes of its contents to help remember the information, take an order from a 'potential customer' and relay the information correctly to the 'chef'.
- Prepare for a team meeting using information from the team leader. This could include sending out an email with accurate details, gathering information from each member for agenda items and creating an agenda using a given template.

**Suggested time:** about 4 hours

**Activities: Recap on prior learning**

Learners could reflect on their learning through the unit by creating mind maps as reference materials showing all of the key concepts and topics covered and key information in each area. Learners could share their knowledge and challenges with each other through peer support discussions.

Learners could then take part in a mock work activity to demonstrate their communication skills and offer feedback to each other on their performance.

Learners take part in an interactive quiz to assess knowledge and understanding and will be provided with text to read and check for accuracy. Learners can review their scores in quiz assessments to highlight areas of further development that they need to review prior to assessment and create a personal plan.

The tutor provides learners with example assessment materials and discusses any challenges or concerns that learners have. Learners to use Post-it notes to display questions and concerns that they have.

**Suggested time:** about 2 hours

**Activity: Preparation for assessment**

The tutor reminds learners of the requirements of the assignment brief and answers any further questions that learners may have.

Group recap on key unit concepts and topics with the tutor using direct questioning **to challenge learners and check understanding.**

**Suggested time:** about 1 hour

**Activity: Post assessment**

Learners will take part in a group discussion to highlight the key points from the unit and how these can be used for their future progression.

Learners reflect on the notes they have produced from reference documents. They summarise what they have gained from the unit and how this will help them with their progression.

**Suggested time:** about 1 hour

## **Suggested assessment activity**

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set duration in which to complete the activity. The activity below is a suggested example. Centres are encouraged to design their own assessment activities based on the interests of the learner and the resources available locally.

### **Task**

Your task is to explore the importance of literacy within the workplace and demonstrate your literacy skills in completing work-related tasks.

You will need to create a document for applicants to explain, using examples of why literacy skills are important in different work-related scenarios and how not using literacy skills effectively can have an impact.

You will then be given a series of work-related tasks which will be communicated to you in different ways. You will need to review the tasks provided and produce detailed information to pass on to others to demonstrate your literacy skills.

### **Retake**

The learner could explore different work-related tasks and be provided with a different audience for which to produce information and documentation

## **Unit 9: Applying Numeracy in the Workplace**

<b>Level:</b>	<b>2</b>
<b>Guided learning hours:</b>	<b>35</b>
<b>Total unit time:</b>	<b>35</b>

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### **Unit in brief**

The aim of this unit is for learners to use relevant information and numeracy skills to carry out work-related tasks.

### **Unit introduction**

Being able to apply your numeracy skills confidently is an essential skill for all workers irrespective of the job they are doing. Mathematical operations such as addition or division are rarely used in isolation. They are more likely to be used in parallel with other numeracy skills in order to achieve realistic solutions. For example, a landscaper is asked for a quote to design a garden. They will measure the area of land, draw plans to scale, calculate the amount of soil needed to fill the area, find out how much the soil costs, decide how much work is involved and then provide a price for the customer.

In this unit you will have the opportunity to use mathematical information to identify appropriate ways to solve work-related tasks.

## Unit summary

Learning aim	Summary of suggested assessment evidence
<p><b>A</b> Understand the importance of numeracy in the workplace</p> <p><b>B</b> Demonstrate numeracy skills effectively in a range of work-related tasks</p>	<ul style="list-style-type: none"> <li>Filmed or voice recorded exchange, written transcript of a role-play scenario or written notes of evidence that was seen and heard</li> <li>Written, spoken or filmed evidence to justify the tools, techniques and processes used</li> </ul>

## Key teaching and learning areas

Key teaching areas include:	
Knowledge	Skills
<ul style="list-style-type: none"> <li>Importance of being numerate in the workplace</li> <li>Basic work-related numeracy skills</li> <li>Ways to extract key information from data</li> <li>How to select appropriate mathematical functions for the given task</li> <li>How to check and share results with others</li> </ul>	<ul style="list-style-type: none"> <li>Use mathematical functions</li> <li>Handle information and data</li> </ul>

## Unit content

### Approach (how the learner should approach this unit)

#### Learners will need to:

- Demonstrate numeracy skills relevant to work-related tasks
- Recognise the importance of numeracy in the workplace, including possible negative consequences of not having appropriate numeracy skills
- Communicate effectively with others as part of a team
- Build confidence in using numeracy skills, e.g. seeking advice, checking proposed methods and solutions using different methods
- Select and use relevant mathematical equipment, methods and techniques relevant to the set task

### Knowledge

#### Work-related numeracy skills

- Work-related numeracy skills, e.g. addition, subtraction, division, multiplication, monetary calculations, measurements
- How to use mathematical information, e.g. identifying information needed for the task, searching for patterns, predict and check information
- Presenting data and numerical information, e.g. graphs, diagrams, tables, charts
- The importance of good numeracy skills in the workplace
- The impact of not having effective numeracy skills in the workplace

#### Basic work-related numeracy tasks

- Using mathematical information to complete a task, e.g. searching for patterns, identifying numerical or financial change, measuring a workspace, weighing ingredients
- Calculating costings, payments, bills, income, cash
- Preparing numerical information for reports or meetings
- Measuring the size of an area/product/item
- Carrying out cash transactions and handing money, e.g. costing, giving change, cashing up
- Scheduling meetings and timings for events or staffing rotas
- Recording numerical data, e.g. telephone numbers, payments, attendance lists, phone calls, hours worked

- Weighing items, ingredients or products for customers or for production purposes
- Risk assessments and risk scoring
- Extracting numerical information from reports or research
- Checking results and carrying out estimations on footfall or attendance

### **Uses of numeracy in the workplace**

- Different uses of numeracy, e.g. estimations, calculations, carrying out financial checks, recording information
- How to select appropriate mathematical functions for tasks
- How to make decisions, e.g. choosing appropriate mathematical operations, choosing tools and equipment
- How the use of numeracy might change in different sectors, e.g. financial numeracy skills in retail, sales and hospitality, data handling and statistics in research, call centres and marketing, measurement skills for construction

### **How to check and share results with others**

- How to check results, e.g. reverse calculations, using digital technology, averages
- How to solve problems, e.g. break down problem into smaller parts, making mental estimates to check reasonableness of answers, interpret solutions

## **Skills**

### **Use mathematical functions**

- Identify single and multifunction processes to solve mathematical problems

### **Handle information and data**

- Select and employ methods of estimating, checking and presenting
- Select and employ mathematical operations in a work context
- Extract key information from data
- Produce graphs, tables and diagrams

## Assessment Criteria

<p><b>Learning aim A: Understand the importance of numeracy in the workplace</b></p> <p>Evidence must include:</p> <p>An explanation of the ways in which numeracy will be important in different workplaces and work-based scenarios, as well as a reflection on the possible negative consequences of not using numeracy effectively or accurately in the workplace.</p>
<p><b>A.P1</b> Explain the importance of numeracy skills in a range of different workplaces and work-based scenarios</p>
<p><b>A.P2</b> Reflect on the possible consequences of not using numeracy skills accurately or effectively in the workplace</p>
<p><b>Guidance for assessors</b></p>
<p><b>For A.P1</b> Learners should explain why being able to use numeracy effectively will be important, considering different workplaces and work-based scenarios. They should consider, in their answer, its impact for them as an employee, for their colleagues and for the successful completion of the tasks at hand</p>
<p><b>For A.P2</b> Learners should reflect on the possible negative impact of not using numeracy skills effectively and/or accurately in the workplace. This may include potential negative effects on them as an employee, their colleagues and the business or organisation as a whole</p>
<p><b>Learning aim B: Demonstrate numeracy skills effectively in a range of work-related tasks</b></p> <p>Evidence must include:</p> <p>The learner demonstrating that they can select and use appropriate numeracy skills to complete work-related tasks. Evidence must also include a justification of the mathematical tools, techniques and processes they used during these tasks.</p>
<p><b>B.P3</b> Select and use numeracy skills effectively, to complete a range of work-related tasks</p>
<p><b>B.P4</b> Justify methods, tools and/or equipment chosen to solve work-based numeracy tasks</p>

**Guidance for assessors**

**For B.P3** Learners should demonstrate that they can select and use appropriate numeracy skills, tools and techniques to complete work-related tasks, for example dealing with money, working out percentages, measuring distance or area, producing or interpreting data, producing or interpreting charts and graphs

**For B.P4** Learners should justify the choices they made regarding the tools and techniques they selected, and the mathematical methods and processes they used, in order to complete work-related numeracy tasks accurately and effectively

## Delivery guidance

It is recommended that practical activities are used in the delivery of this unit to help learners develop both essential knowledge and skills. The following are suggestions for activities and workshops that can engage learners and be used in preparation for the final assessment. These are not intended as a definitive guide to cover the full GLH of the unit.

### **Activities: Introduction to unit**

The tutor begins the session by explaining the unit title and the aims of the unit. Tutors explain to learners that although they will develop numeracy skills as part of the unit, the main aim of the unit is to apply numeracy to workplace tasks and problems.

Working in small groups, learners discuss their feelings about mathematics, how confident they are in using numeracy skills and areas that they have concerns about. Learners could each mark their confidence on a confidence line displayed by the tutor, with 0 being no confidence and 10 being very confident.

Learners should identify personal goals that they would like to achieve by the end of the unit. This should be revisited as part of the post-assessment discussions.

YouTube clips relating to maths in the workplace can be used to give an overview of the unit. Tutors provide discussion points that help learners focus on aspects of the videos.

The tutor could display a series of simple mathematical problems in work and learners will rotate around the problems in small groups and solve them through discussions and peer support. Problems could include calculating change from a purchase, working out the amount of materials required, structuring a rota or reading diagrams to get information.

Working in small groups, learners discuss the tools and equipment that are used in the workplace to calculate mathematical operations, e.g. cash machines, self-service checkout points, automatic weighing machines. Learners could discuss the advantages and disadvantages of using these machines for calculations. Discussions focusing on predicting, estimating and checking outcomes.

**Suggested time:** about 3 hours

### **Activities: Using numeracy skills in a work context**

Working in small groups, learners should be given a specific work sector, ideally one that they are particularly interested in. They then create a mind map showing the role of numeracy in the sector while identifying different mathematical tasks that staff in the sector would carry out. Learners should then display their mind maps and discuss the similarities and differences across sectors to generate a combined list of workplace mathematical tasks.

Guest speakers from different sectors could be invited to discuss the mathematical functions that they use within their job role to complete tasks and activities linked to the role and sector. Alternatively, learners could create a questionnaire that they carry out with different people to identify the tasks and functions used by different people in different job roles.

If learners are on work experience, they could record different tasks where they are using a range of mathematical operations. This information is then to be fed back to the wider group to discuss.

Tutor to provide learners with a series of work-related tasks as identified within the first activity. Learners then work in pairs to discuss each of the tasks and work together to solve the task while recording the mathematical skills that they are using. Learners to feed back to the group.

Learners to work individually to carry out research into their chosen job roles or sectors and to identify the different mathematical skills required; they should outline the tasks and activities that such roles have to undertake that link to or require mathematical skills. Learners should self-assess their ability and identify areas of numeracy that they need to improve based on their career aspirations.

To summarise learning, learners could engage in a role-play activity demonstrating their use of numeracy skills within workplace scenarios. Learners could at first demonstrate their own processes, and then follow instructions provided by their peers to complete tasks and activities.

**Suggested time:** about 5 hours

### **Activities: Making decisions about mathematical information**

Tutor to revisit the mind maps created by learners in the previous section to discuss the different mathematical tasks and consider how these could be solved. Learners to discuss their thoughts on how tasks could be completed and mathematical problems solved in the workplace.

Learners to then work in small groups to create a flowchart for decision making when solving problems. Learners could present their flowchart and provide feedback to peers.

Tutor to provide learners with an overview of the decision-making process and ask learners to compare the process with their flowchart; was anything missing? Were actions in the right order? Do you think this process works?

- What is the task?
- Consider all the information provided
- What options are possible?
- What approaches can you use?
- Decide on a way forward

Learners could then create their own decision-making process cheat sheet for future reference and consider any other steps or actions that they would take, sharing their ideas with others through peer-to-peer discussion and feedback.

Tutors provide learners with a range of work-related tasks that require them to identify relevant information. Working in groups, learners would need to identify the mathematical operations to use and the tools and/or equipment necessary to complete the task. Learners complete tutor-devised worksheets that include questions such as:

- What is the proposed outcome?
- What information have you been given?
- What do you need to find out?
- What mathematical operations will you need to use?
- How will you check that your proposed method is the right one?
- Do you anticipate any difficulties?

Learners to be given tasks that require the use of multiple functions in order to work out the solution. On completion of the task, learners share their work with the wider group to discuss the challenges they encountered and how they resolved it.

Learners could then produce their own mathematical task linked to work-related activities and share this with other learners for them to complete.

To summarise, learners could be given a series of mathematical problems that when solved provide the numbers to access a combination lock or break a code. Learners could work in pairs or small groups and see who can solve the problems the quickest.

**Suggested time:** about 4 hours

### **Activities: Problem solving using common measures and money**

To recap on learning from previous session, learners work in small groups to calculate multi-step problems in work-related context. They would need to calculate solutions using common measures such as length, weight, capacity, perimeters, area and time.

For example, they plan an accurate 10k running route as part of their role as a fitness instructor. The plan would include measurement markers of both kilometres and miles, water stations at given points on the route and a first aid station halfway round. A diagram may be drawn to show the route. Having presented their information, learners then check their calculations using running apps. On completion of the activity, learners could discuss the challenges they had in completing the task, what numeracy skills they needed to use and how they were going to develop them.

Learners complete a tutor-devised worksheet that requires them to identify the function of different money-handling equipment used in the workplace, e.g. touch screen tills, receipt printers, card machines. Learners discuss the advantages and disadvantages of different types of equipment for the customer, the employer and the employee.

Tutors devise worksheets that require learners to calculate percentage increases, decreases and discounts on work-related products.

For example, it is coming to the end of the financial year and the garden centre would like to get rid of excess stock. They are dropping all prices by a given percentage. Shoppers can make monthly payments or three payments spread over the year but there would be interest to pay each month. There would also be delivery costs. Learners calculate the cost to the customer if they choose a one-off payment with delivery, monthly payments with delivery, etc. The complexity of the scenario to be adapted to meet the numeracy skills of the learners.

Learners carry out an internet search on the actual cost of different types of equipment required to carry out a specific work-related task. They then apply a percentage, increase the cost and work out the profit they might make.

**Suggested time:** about 6 hours

### **Activities: Using information and data**

Learners research different sources of information and/or use given information to find solutions, e.g. mean, median, mode and range. Sources include simple company results, comparison of shop takings over a period of time, number of clients attending and missing dental appointments by month.

Using the information they have found, learners create their own work-related tasks requiring mathematical operations. Learners work out the solutions and then pass them on to other groups in the task to use. The tasks could be based on personal experiences from work experience or in the home.

Learners to take part in an interactive quiz showing different ways of presenting numerical information. Learners to state the correct name for the method shown. Following the quiz, learners should ask questions and query any areas or methods that they are unsure of.

Tutor to provide learners with an overview of the different methods explored in the previous activity and encourage learners to identify when each method could be used and why someone might choose to present data in this way.

Learners research some key facts/data about their chosen sector of work. Learners should then present this data in a format of their choice (graph, table, chart, diagram) and display this in the classroom. Learners should be able to explain why they have chosen the method used.

Learners could then work in pairs or small groups to create a questionnaire on any given topic that they can carry out to collect data. Learners should then use their completed questionnaire to generate outcomes and findings, presenting information in graphs, charts or diagrams. Learners should then present their findings to the group.

**Suggested time:** about 4 hours

### **Activities: Ratio, scale and area**

Tutor to provide an overview of ratio, scale and area as mathematical processes. Learners to explain their understanding of each and raise questions or uncertainties.

Flipcharts for ratio, scale and area to be displayed within the classroom. Learners to rotate around the three flipcharts and write on them the different ways that they feel these could be used within a workplace, giving examples of tasks and activities.

Learners participate in a range of tasks that require them to use ratio. Workplace examples include using ratio in creating drinks or products, ratio of staff to customers, sharing gratuities in ratio, calculating ratio of types of customer. Alternatively, learners could take part in practical demonstrations of ratio, e.g. baking a cake or mixing cement.

Learners participate in a range of tasks that require them to calculate size using scale factors. Examples include learners are working in a framing shop and the customer has brought in a picture. The learner must measure it accurately. The customer would like to reduce the size of the picture. The learner would need to use a given scale factor to work out the area of the picture.

Learners participate in a range of tasks that require them to use area and measurement. Workplace examples include using area in measuring floor space, calculating the amount of turf needed for a lawn, working out how many people can use a particular area, calculating how many boxes can be stored in a location.

To summarise, learners could complete an interactive quiz to test their understanding of ratio, scale and area.

**Suggested time:** about 5 hours.

**Activities: Recap on prior learning**

Learners could reflect on their learning through the unit by creating mind maps as reference materials showing all of the key concepts and topics covered and key information in each area. Learners could share their knowledge and challenges with each other through peer support discussions.

Learners could then take part in numerical problem-solving challenges linked to workplace activities to demonstrate skills and offer feedback to each other on their performance.

Learners take part in an interactive quiz to assess knowledge and understanding and will be provided with data to read and check for accuracy. Learners can review their scores in quiz assessments to highlight areas of further development that they need to review prior to assessment and create a personal plan.

The tutor provides learners with example assessment materials and discusses any challenges or concerns that learners have. Learners to use Post-it notes to display questions and concerns that they have.

**Suggested time:** about 2 hours

**Activity: Preparation for assessment**

The tutor reminds learners of the requirements of the assignment brief and answers any further questions that learners may have.

Group recap on key unit concepts and topics with the tutor using direct questioning to challenge learners and check understanding.

**Suggested time:** about 1 hour

**Activity: Post assessment**

Learners will take part in a group discussion to highlight the key points from the unit and how these can be used for their future progression.

Learners reflect on the notes they have produced from reference documents. They summarise what they have gained from the unit and how this will help them with their progression.

**Suggested time:** about 1 hour

## **Suggested assessment activity**

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set duration in which to complete the activity. The activity below is a suggested example. Centres are encouraged to design their own assessment activities based on the interests of the learner and the resources available locally.

### **Task**

Your task is to explore the importance of numeracy within the workplace and demonstrate your numeracy skills in completing work-related tasks.

You will need to create a document for applicants to explain, using examples of why numeracy skills are important in different work-related scenarios and how not using numeracy skills effectively can have an impact.

You will then be given work-related tasks which will include a range of numerical problems. You will need to review the tasks provided to select and use methods, tools and/or equipment to carry out mathematical functions and solve the problems.

### **Retake**

The learner could explore different numerical problems and be provided with different data and numerical information to review.

# **Unit 10: Planning the Use of Digital Products and Services in the Workplace**

<b>Level:</b>	<b>2</b>
<b>Guided learning hours:</b>	<b>35</b>
<b>Total unit time:</b>	<b>35</b>

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## **Unit in brief**

The aim of this unit is for learners to appreciate the role of digital products and services in the workplace.

## **Unit introduction**

There are very few organisations today that do not use any form of online technology. Many organisations and individuals use digital products and services to promote/sell their products, services and lifestyles.

In this unit you will understand the use of digital products and services and why it is used in the workplace. You will present a document outlining your findings.

You will demonstrate your use of digital products and services for a business-related purpose.

## Unit summary

Learning aim	Summary of suggested assessment evidence
<p><b>A</b> Understand the use of the digital products and services in an organisation</p> <p><b>B</b> Create an advertising package for a given organisation, using digital products and services</p>	<ul style="list-style-type: none"> <li>• A document identifying ways digital products and services can be used in an organisation</li> <li>• A practical activity to create an advertising package for an organisation</li> </ul>

## Key teaching and learning areas

Key teaching areas include:	
Knowledge	Skills
<ul style="list-style-type: none"> <li>• Understand the use of digital products and services in business</li> <li>• How teams can work together to achieve work-related tasks</li> <li>• Use digital products and services to aid towards completing a work-related task</li> </ul>	<ul style="list-style-type: none"> <li>• Research</li> <li>• Use digital products and services to aid towards completing a work-related task</li> <li>• An account of personal performance</li> </ul>

## **Unit content**

### **Approach (how the learner should approach this unit)**

#### **Learners will need to:**

- Understand why organisations use digital products and services
- Use online technology for a work-related task
- Present their findings in an appropriate format
- Review their own performance

#### **Knowledge**

##### **Understand the use of digital products and services in business**

- Social networks to connect with people (and brands), e.g Facebook, Twitter, LinkedIn
- Media sharing to find and share photos, video, live video, and other media online, e.g Snapchat, Instagram, YouTube, Tik Tok
- Consumer review networks to find, review and share information about brands, products, travel destinations, restaurants and more, e.g. TripAdvisor, Yelp, Zomato
- Blogging and publishing networks to publish and comment on content online, e.g. WordPress, Tumblr
- Discussion forums to find, discuss and share news, information and opinions, e.g. reddit, Quora, Digg
- Video-conferencing as a workplace communication tool, e.g. Teams, Zoom
- Cloud based technologies, e.g. Google Docs, Microsoft365

##### **How teams can work together to achieve work-related tasks**

- Communicate and engage with customers by using interactive features, e.g. online forms, chat facilities, navigation methods
- Promote/sell products and services, e.g. visual advertisements, banners, popups
- Sell products and services, e.g. secure online payments, same day delivery, easy returns
- Allow customers to compare products, e.g. to view different organisations social media
- Customer feedback, e.g. forms
- Improvements, e.g. products, services, communications
- Wider audience, e.g. global reach, more sales

- Keep ahead of competitors, e.g. view competitors use of digital media
- Bookmarking and content networks to discover, save, share and discuss new and trending content and media, e.g. Pinterest, Flipboard
- Social shopping networks to spot trends, follow brands, share finds and make purchases, e.g. Etsy, Fancy

## **Skills**

- Use digital products and services to aid towards completing a work-related task
- Respond to information
- Self-reflection
- Research

## Assessment Criteria

<b>Learning aim A: Understand the use of the digital products and service in an organisation</b>
Evidence must include: A summary of findings in an appropriate format.
<b>A.P1</b> Understand the different types of digital product and service used in organisations and why they are used
<b>Guidance for assessors</b>
<b>For A.P1</b> Learners should present a summary of their findings identifying advantages to an organisation of using digital products and services
<b>Learning aim B: Create an advertising package for a given organisation, using digital products and services</b>
Evidence must include: A digital product and a brief account of performance.
<b>B.P2</b> Create a digital product for a given purpose
<b>Guidance for assessors</b>
<b>For B.P2</b> Learners should create a digital product and provide a brief account of performance

## Delivery guidance

It is recommended that practical activities are used in the delivery of this unit to help learners develop both essential knowledge and skills. The following are suggestions for activities and workshops that can engage learners and be used in preparation for the final assessment. These are not intended as a definitive guide to cover the full GLH of the unit.

### **Activities: Introduction to unit**

Tutor-led activity to introduce the requirements of the unit, including purpose, ways of working, expected personal learning outcomes and assessment methods.

Key words and terms related to the unit could be discussed and a glossary compiled, e.g. digital media, purpose, advantages, audience, pitch.

Learners to create a word-wall showing different words and terms that link to the topic and concept of the unit. This can be revisited throughout the unit.

**Suggested time:** about 2 hours

### **Activities: The internet in the workplace**

Tutor introduction of the concept of the internet in the workplace and the impact that it has had on businesses and workplaces globally. Learners to research and find one example of how the internet has improved the workplace and share their findings.

Learners to identify a range of organisations and individuals that use digital media as part of their business locally.

Learners to work in pairs to devise a questionnaire which they will then use to gather information from local businesses and organisations as to how they use the internet in their workplace and how they use digital media as part of their business.

Learners to create a mind map showing the benefits of having the internet and digital media within the workplace considering employers, employees and the business, whilst also showing the drawbacks and threats that it poses. Learners to share their suggestions.

Tutor to conclude the section by explaining acceptable use policies within the workplace and how these are used to ensure that the internet does not become a risk or a threat. Learners to research and find examples of acceptable use policies.

**Suggested time:** about 3 hours

**Activities: Raising awareness of advertising enhancements**

The tutor introduces the broad area of advertising before digital media and websites. Tutor should provide learners with examples of older print-based advertising and text-only advertising. Links to teletext would be beneficial to demonstrate the initiations of digital media.

Discussions could focus on comparing present day tasks to the past and the difficulties that may have been encountered by organisations/individuals when digital media was not available.

Learners discuss a scenario from the past where an organisation only had printing options and consider the current methods and the benefits that this has had on the organisation and its employees.

Learners to be given a case study of an organisation using only printing options, learners should make suggestions of ways that the organisation could use digital media and explain how this could benefit them.

Learners should select an organisation of their choice and research their advertising prior to digital media and websites to create a chronological progression line to show how they have developed and how digital media has enhanced their advertising.

Interactive vote: learners to create an online poll for others to complete which shows traditional print advertising with contrasting digital media advertising – users should vote for their favourite. Learners to gather their findings and share their conclusions.

**Suggested time:** about 3 hours

**Activities: Finding out about types of digital media**

Tutor to explore digital media and the types of digital media that can be used in a business or workplace. Tutor to show some examples and provide learners with an overview of each type, its benefits and drawbacks.

Learners to be given a list of different types of digital media and asked to find an example of each from the internet. Learners should identify the purpose of each one found and explain how it could be used in a business or workplace.

Learners will then each be given one type to explore in more detail. Learners should source a range of different examples of their type of digital media and create a short presentation to share key points with others.

Groups then compare their findings in a feedback session.

**Suggested time:** about 3 hours

**Activities: Finding out features used on digital media**

Tutor to explain the different features that are commonly used on digital media products as an introduction.

Learners to create a checklist of common features. They must research the use of digital media in two organisations offering different products or services and tick off the features that have been used. Learners should provide one reason why they think each of the features has been used and share their findings.

Learners could gather evidence of different features and create a cheat sheet for their own reference to support learning and understanding.

Learners to consider in small groups the most effective features used on digital media products to select and justify those that they would use in their own products.

**Suggested time:** about 3 hours

**Activities: Researching types of digital media for an audience**

Introduction led by the tutor for a discussion on the most appropriate type of social media an organisation uses to promote a new product to a target audience – primary school children, teenagers, those in their mid-20s, mid-50s and over 70. Learners to be put into groups and choose one age range. The class needs to cover all age ranges to allow for a purposeful discussion.

Learners to work in pairs to research a given organisation and collect examples of the existing digital media methods that they use to promote their product/service. Learners should then consider how the methods match and are appropriate for the chosen audience of the business.

Continuing from the previous activity, learners will then collectively create flipcharts to show different age groups/types of customers and the appropriate types of digital media for the audience which can be displayed.

Group feedback discussion to explore learner choices and decisions. Tutor to explain some of the trends in digital media and ask learners to consider why trends might occur.

Learners to work in small groups to consider each different type of digital media and discuss the pros and cons of using them. Learners may choose to create a short PowerPoint presentation to display their findings.

**Suggested time:** about 3 hours

**Activities: Using digital media to promote a product**

Tutor demonstration of using digital media to create an advert for a given organisation. Learners observe and comment on how the digital media used promoted the product (or not).

External guest speaker from a marketing company or digital media organisation to discuss how they have used digital media to enhance their business and how it has helped to promote products/service (or not) and what challenges they have faced.

Learners should research a range of good and bad advertisements that use digital media with a list of reasons why they consider them appropriate or not.

**Suggested time:** about 2 hours

**Activities: Creating a 'moving' digital media product**

Tutor to explain the activity and support learners to thought shower a range of different moving digital media products that they could consider.

Learners to work in pairs to create a moving digital advert using one type of digital media to promote/sell a particular product to a given audience. For example, a short video (vlog).

Learners to present their moving digital media product and pitch their idea to the group. Learners to provide peer feedback.

**Suggested time:** about 3 hours

**Activities: Creating a written digital media product**

Tutor to explain the activity and support learners to thought shower a range of different written digital media products that they could consider.

Learners to work in pairs to create a written digital media product for a given scenario or product. For example, a flyer/poster/social media post.

Learners to present their written digital media product and pitch their idea to the group. Learners to provide peer feedback.

**Suggested time:** about 3 hours

**Activities: Working in groups**

Groups or teams: learners to be given a series of cards with titles on of groups or teams; learners to decide which is a group and which is a team based on the key definitions; team – all working towards a united goal, group – all have a similar interest.

Tutor-led discussion and guidance on group working; learners should consider what makes a good group? What makes an effective team? What makes a good leader?

Learners can discuss their experience of being in a group or a team and what challenges and successes they faced. Learners should then identify common themes and techniques linked to success and themes linked to failures and challenge.

In small groups, learners should select and agree on ground rules and teamworking rules that they can all follow. Learners should present their group rules and discuss the reasons behind those agreed.

Learners could take part in some simple team-building activities designed by the tutor to check the effectivity of their team and group. Learners could then reflect on their performance and discuss changes and improvements.

In small groups, learners watch example video extracts of teams planning and carrying out tasks and discuss their effectiveness, strengths and areas of improvement. Learners should then identify lessons learned.

**Suggested time:** about 3 hours

#### **Activity: Preparation for assessment**

The tutor reminds learners of the requirements of the assignment brief and answers any further questions that learners may have.

Group recap on key unit concepts and topics with the tutor using direct questioning to challenge learners and check understanding.

**Suggested time:** about 1 hour

#### **Activity: Post assessment**

Learners will take part in a group discussion to highlight the key points from the unit and how these can be used for their future progression.

Learners reflect on the notes they have produced from reference documents. They summarise what they have gained from the unit and how this will help them with their progression.

**Suggested time:** about 1 hour

## **Suggested assessment activity**

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set duration in which to complete the activity. The activity below is a suggested example. Centres are encouraged to design their own assessment activities based on the interests of the learner and the resources available locally.

### **Task**

Your task is to explore how one organisation or individual uses digital media to promote/sell its products, services or lifestyle considering the advantages of using digital media to do this.

You will need to research the different types of digital product and service that a selected organisation/individual uses and how they use them effectively. You also need to consider the platforms that can be used to promote products digitally.

You will then be given a product or service to promote. You must research a range of digital media products that could be appropriate for your product or service and use these to create a digital product.

You will pitch your product, to a small group, in the form of a presentation to explain the type of product chosen, the features used and how this meets the organisational need.

### **Retake**

The learner could research and explore a different organisation or individual and create digital products for an alternative product/service.

# **Unit 11: Using IT to Manage Information at Work**

<b>Level:</b>	<b>2</b>
<b>Guided learning hours:</b>	<b>35</b>
<b>Total unit time:</b>	<b>35</b>

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## **Unit in brief**

The aim of this unit is for learners to understand the different uses of software applications within the workplace to support them in selecting and using an appropriate software application for a given task.

## **Unit introduction**

The use of software applications in the workplace is huge and growing daily. Selecting the most appropriate software allows data or information to be collated and formatted in a way that supports the need to review, share or manage information.

This unit will enable you to develop the skills needed to select the most appropriate software application that meets your needs and enhance your understanding on how to use the software applications to display or manage information or data you are handling.

## Unit summary

Learning aim	Summary of suggested assessment evidence
<p><b>A</b> Evaluate software applications that are used in the running and management of the workplace</p> <p><b>B</b> Select and use a range of work-based software applications</p>	<ul style="list-style-type: none"> <li>• Tutor and/or supervisor observations. Audio, video or photographic evidence that show the learner meeting the practical criteria</li> <li>• Notes or work-product evidence, such as slide deck, copy of an email</li> </ul>

## Key teaching and learning areas

Key teaching areas include:	
Knowledge	Skills
<ul style="list-style-type: none"> <li>• Software applications</li> <li>• Work-based software applications</li> <li>• Importance of applications in workplaces</li> <li>• How to use software applications to support the running and management of a workplace</li> <li>• How to collect information using application/s</li> <li>• How to share information with internal and external stakeholders using application/s</li> </ul>	<ul style="list-style-type: none"> <li>• Use software applications</li> <li>• Share information with others</li> <li>• IT presentation skills</li> <li>• Information management</li> </ul>

## **Unit content**

### **Approach (how the learner should approach this unit)**

#### **Learners will need to:**

- Understand the different software applications used for different purposes
- Select and use appropriate software to aid in completing tasks
- Use communication skills to share information with internal and external stakeholders
- Select, review and manage information to select pertinent points

### **Knowledge**

#### **Software applications**

- Generic software applications, e.g. word processing, presentation, graphics, Microsoft applications

#### **Work-based software applications**

- Using relevant specific applications for work purposes, e.g. booking, stock control, staff management

#### **Importance of applications in workplaces**

- Importance for a workplace, e.g. efficiency, effectiveness, ease of use, consistency

#### **How to use software applications to support the running and management of a workplace**

- Purpose, e.g. data collection, data formatting, sharing messages, system management

#### **How to collect information using application/s**

- How to use each relevant application
- How to select the right application for the task, e.g. considering work-based requirements

#### **How to share information with internal and external stakeholders using application/s**

- Using applications to share information, e.g. considering audience need
- How sharing with internal colleagues may differ from sharing with external stakeholders

## **How information can be presented**

- Types of information, e.g. written, financial, numerical, statistical, confidential, verbal, pictorial
- Formats, e.g. letter, email, presentation slides, posters, report, online document, spreadsheet

## **Skills**

### **Use software applications**

- Select appropriate application/s for the task
- Generic applications, e.g. creating a rota, producing a flyer, writing a letter, survey creation
- Workplace specific applications, e.g. point of sale (POS) software, customer relationship management (CRM) software, website creation software, ordering stock

### **Share information with others**

- Applications for information sharing, e.g. email, memo, secure-email, Google drive, OneDrive, Teams, Hangout, Zoom
- Appropriateness of applications, e.g. considering security of information, suited to the audience, accessible to all users

### **IT presentation skills**

- Formatting different types of information, e.g. text, numbers, images, editing techniques for different types of information
- Combine different types of information, e.g. presentation with images, numbers with charts
- Page layout, e.g. size, orientation, margins, page numbering

### **Information management**

- Organise information, e.g. headings, lists, charts
- Manage information, e.g. select pertinent points to share

## Assessment Criteria

<p><b>Learning aim A: Evaluate software applications that are used in the running and management of the workplace</b></p> <p>Evidence must include:</p> <p>An evaluation of a range of software applications that are used in different workplaces and an explanation of applications that can be found in an identified business.</p>
<p><b>A.P1</b> Evaluate a range of software applications that support the running and management of different workplaces</p>
<p><b>A.P2</b> Explain the use and importance of software applications that are used in an identified workplace</p>
<p><b>Guidance for assessors</b></p>
<p><b>For A.P1</b> Learners must evaluate a range of software applications that are used in different workplaces, environments and sectors to support their running and management. They must explore the positives that these applications bring but also look at any negative consequences of their use. For example, email might make communication quicker and easier but may also inhibit the development of working relationships (compared to face-to-face communication) and encroach on non-work time</p>
<p><b>For A.P2</b> Learners must explain what, when, how and why software applications are used in an identified workplace, including the importance of each for the effective and efficient running and management of the business</p>
<p><b>Learning aim B: Select and use a range of work-based software applications</b></p> <p>Evidence must include:</p> <p>Demonstration that shows the learner can select and use appropriate software applications to support the running and management of a workplace with a high degree of success and can select and use software applications to share information with internal and external stakeholders.</p>
<p><b>B.P3</b> Select and use work-based software applications to support the running and management of a workplace</p>
<p><b>B.P4</b> Select and use work-based software applications to present information to internal and external stakeholders</p>

### Guidance for assessors

**For B.P3** Learners will select and use software applications to support the running and management of a selected workplace. They should show that they can select the most appropriate application for the task and use their selected applications to complete the task with a high degree of success. This may include using a spreadsheet, writing a document that includes relevant work-based information, using a workplace specific application such as a booking or stock control system

**For B.P4** Learners will share information using appropriate software applications to support them. They will select and use appropriate applications to share information with internal colleagues, e.g. in a staff meeting, one to one, to upskill on a new product or system, to feedback on performance, and on another occasion to share information with external stakeholders, such as clients, customers or the public via social media, email, advertising, sharing financial data

## Delivery guidance

It is recommended that practical activities are used in the delivery of this unit to help learners develop both essential knowledge and skills. The following are suggestions for activities and workshops that can engage learners and be used in preparation for the final assessment. These are not intended as a definitive guide to cover the full GLH of the unit.

### **Activities: Introduction to unit**

Tutor-led activity to introduce the requirements of the unit, including purpose, ways of working, expected personal learning outcomes and assessment methods.

Learners to work in pairs to identify different types of multimedia products that can be used in the workplace, e.g. websites, interactive presentations, computer-based training, information points, e-magazines. Learners to feed back to group.

Learners to take part in an interactive presentation. Learners to be shown clips/images/videos of famous multimedia products and must identify the purpose of the product – to entertain, to educate, to advertise – and score it for originality. Learners to discuss their thoughts and feed back.

**Suggested time:** about 2 hours

### **Activities: Types of information**

Learners to work in small groups to identify a range of different types of information that may be communicated and shared within a workplace. Learners could be given a workplace or sector to explore and share their ideas to highlight similarities and differences.

Tutor to display a range of completed multimedia products from a range of software applications around the classroom. Learners to consider each of the products and highlight the positives and negatives of each one, and what could be done to improve them.

Learners to carry out research in pairs to contact and speak to different workplaces and employees to identify all of the information that they gather, use and share within their job role. Learners should then share their findings and separate them into key groupings of types of information: written, digital, numerical, confidential.

**Suggested time:** about 2 hours

### **Activities: Software applications**

Tutor-led activity to explore the meaning of the terms 'software' and 'applications'. Learners to contribute to discussion and share examples of software and applications that they are familiar with and have engaged with.

Learners should then review the list of applications and software generated through discussion and highlight those that may be used within a workplace to help gather, create and/or share information.

Tutor to then engage learners in discussion about general software applications that are used across different organisations, word processing, presentation software, spreadsheets, Microsoft applications, Google applications, Apple applications, etc.

Learners will then work in three groups to research one of the generic applications: word processing, presentation software or spreadsheets. Learners will identify different applications that can be used to fulfil each function and share the strengths and weaknesses of each. Learners will then present their findings to the group in short presentations.

Learners could then create a survey which asks others to identify how often they use generic software applications. Learners to collate results and discuss their findings.

Learners could then be split into three groups and rotate around a series of work-based tasks that require them to use each of the functions of generic software applications on different platforms (Google, Microsoft, etc.). Learners could peer review the work completed and share their experiences of completing the tasks.

Learners to work in pairs to identify the advantages and disadvantages of each of the software applications used within the activities. Learners should also consider how each of them can be used within the workplace and how they could benefit and enhance working processes.

**Suggested time:** about 6 hours

### **Activities: Work-based software applications**

Tutor to ask learners to think about the different software applications that can be used within workplaces to target and support specific workplace activities. Tutor to prompt examples, such as the application used to book, the software used to pay and calendar systems. Learners who have undertaken work experience could share their experiences.

Guest speakers from different sectors and workplaces could be invited to speak to learners about the software applications that they use within their own workplace and the purpose of these applications. For example, the hospitality sector could discuss booking systems and food ordering applications, the healthcare sector could discuss monitoring systems, HR could discuss staff management systems and logistics/retail could talk about stock control or POS systems.

Learners work in small groups to explore a selected workplace and the software applications that they might use to enhance the organisation. Learners to list software applications and then outline the importance of these within the workplace.

Finally, tutor to provide learners with work-based case studies to discuss. Learners will identify possible software applications that could help solve the problems identified or enhance the organisation and working experience.

**Suggested time:** about 3 hours

### **Activities: Collecting and handling data**

Tutor to introduce learners to the concept of collecting and handling data within a workplace environment and within different job roles. Learners to work in pairs to identify different types of data to create a word-wall.

Learners to each select a given workplace and work in pairs to identify all of the data that they might collect and use within the sector. Learners should then identify which of the data is sensitive and should be stored securely and which could be shared with others.

Learners could then research different online software that can be used to gather data and collect information, such as SurveyMonkey, Microsoft forms, Google forms. Tutor to demonstrate how to use these platforms.

Tutor to demonstrate how to use spreadsheet software to record and manipulate data to suit a given purpose or meet a specific need. Tutor to deliver a workshop on using graphs, diagrams and charts, and to demonstrate how to transfer data from one software application to another.

Learners to engage in a paired activity. Learners will create a digital survey using online software to gather information and data from a range of people. Learners will then use software to record their data, manipulate it and then present their findings in graphical or diagrammatic form. Learners will then present their work to the group for peer-to-peer feedback.

**Suggested time:** about 5 hours

### **Activities: Presenting information**

Tutor to explain to learners that organisations have both internal and external stakeholders who will have different expectations on the information they require, and that the way information is presented will also need to be amended to suit audiences. Learners to discuss what information might be kept internal and what might be shared externally.

Learners to work in pairs to identify different stakeholders (internal and external) that may require information within the workplace and the types of information and presentation that they would expect. Learners could then share their suggestions with the group.

Tutor to place flipcharts around the room with different types of information on each: written, financial, numerical, statistical, confidential. Learners to rotate around the flipcharts and make their own suggestions as to how this information could be presented for internal and external stakeholders.

Learners work in groups to explore different workplace documents to identify strengths and weaknesses in the way that information is presented. Learners could consider college prospectuses, brochures, leaflets, websites, letters and share their views. Learners could then identify ways that the presentation could be improved and enhanced.

Learners to then work in pairs to select a specific format for presentation (letter, email, presentation, poster, report) and create a how-to guide for best practice which highlights the key points of each format and the way it should be approached. Learners could also explore different templates and share these when presenting their how-to guide.

**Suggested time:** about 5 hours

### **Activities: Sharing and collaborating**

Tutor to introduce learners to the idea of information sharing and working collaboratively within a workplace. Learners to research different file sharing software and applications that could be used within the workplace to share information internally and externally and share their findings.

Learners to work in pairs and select a method of sharing information, whether internal or external, and discuss the advantages and disadvantages before sharing with the rest of the group.

Tutor to ask learners to think about what information should and should not be shared due to data protection and confidentiality. Learners should create a list of the different information they can and cannot share, internally and externally to the organisation. Learners to then share their justifications.

Finally, learners could follow an instruction sheet to create, share and receive information using different platforms and software. Learners should be tasked with using the most common methods of sharing information: email, filesharing, online sharing (Google/OneDrive).

**Suggested time:** about 3 hours

### **Activities: Work-based scenarios**

Learners will work in small groups to summarise learning by completing a series of work-based scenarios using a variety of different software applications. Learners should be encouraged to use multiple applications within each activity in order to assess learning and understanding.

Example scenarios include:

- You have been provided with a range of data that needs to be formatted and then shared with other colleagues.
- You have been asked to create a presentation and speaker notes for an upcoming meeting.
- You have been tasked with researching and planning a weekend break for a client and need to produce a cost sheet and information pack.

**Suggested time:** about 2 hours

**Activities: Preparation for assessment**

The tutor reminds learners of the requirements of the assignment brief and answers any further questions that learners may have.

Group recap on key unit concepts and topics with the tutor using direct questioning to challenge learners and check understanding.

**Suggested time:** about 1 hour

**Activities: Post assessment**

Learners to work in their pairs/small groups to finalise the multimedia products that they have created.

Learners pitch their products and demonstrate their webpage and other interactive products to the group. Learners to review and provide feedback to identify strengths and areas for improvement.

Learners could demonstrate their products to employers and guest speakers to access formal professional feedback and review.

Learners should individually review their performance and the success of their products and recognise strengths, weaknesses and identify changes for the future.

**Suggested time:** about 2 hours

**Activity: Post assessment**

Learners will take part in a group discussion to highlight the key points from the unit and how these can be used for their future progression.

Learners reflect on the notes they have produced from reference documents. They summarise what they have gained from the unit and how this will help them with their progression.

**Suggested time:** about 1 hour

## **Suggested assessment activity**

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set duration in which to complete the activity. The activity below is a suggested example. Centres are encouraged to design their own assessment activities based on the interests of the learner and the resources available locally.

### **Task**

Your task is to explore different software applications, tools and techniques used in the workplace and use these to produce a multimedia product for a given purpose.

You will need to create a fact sheet for employees which identifies a range of different software applications that are used within different workplaces as well as an explanation of the use and importance of each software application.

You will then be given a work-place scenario to review. Using the scenario, you will demonstrate your ability to use work-based software applications to support the running and management of the workplace and to present information.

### **Retake**

The learner could research and evaluate different software applications, produce alternative documents and respond to a different work-place scenario.

## **Unit 12: Assessing and Managing Risk in the Workplace**

**Level:** 2

**Guided learning hours:** 35

**Total unit time:** 35

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### **Unit in brief**

The aim of this unit is for learners to know potential risks and hazards in different work situations and be able to carry out a risk assessment in order to minimise those risks.

### **Unit introduction**

Everyone has responsibility for their own and others' health and safety in the workplace. Knowing the potential risks and hazards when using equipment, materials or working in different environments can help to reduce accidents.

In this unit you will use your knowledge of potential risks and hazards to carry out a risk assessment in a work area during work experience or in your learning centre.

## Unit summary

Learning aim	Summary of suggested assessment evidence
<p><b>A</b> Assess workplace health and safety requirements</p> <p><b>B</b> Carry out a risk assessment and take action as appropriate</p>	<ul style="list-style-type: none"> <li>• Individual checklists or records of discussion between the learner or tutor, notes, audio or video evidence</li> <li>• Records of tutor observations, photographic evidence, screenshots, audio or video evidence</li> <li>• Completed risk assessment template</li> <li>• Written, filmed or digital voice recording evidence that shows learner understanding</li> </ul>

### Key teaching and learning areas

Key teaching areas include:	
Knowledge	Skills
<ul style="list-style-type: none"> <li>• Health and safety responsibilities</li> <li>• Workplace health, safety and welfare</li> <li>• Use of personal protective equipment (PPE)</li> <li>• Ergonomics and manual handling</li> <li>• Risks, hazards and potential consequences</li> </ul>	<ul style="list-style-type: none"> <li>• Research</li> <li>• Problem solving</li> <li>• Completing risk assessment</li> <li>• Taking action to minimise risks and hazards</li> </ul>

## **Unit content**

### **Approach (how the learner should approach this unit)**

#### **Learners will need to:**

- Work and communicate effectively with others
- Work independently when identifying potential risks and hazards in their work area
- Recognise the importance of own responsibilities for health and safety in the workplace
- Understand safe practice, health and safety guidelines and PPE requirements in different work environments
- Be able to adapt safety needs according to the work environment

#### **Knowledge**

##### **Health and safety responsibilities**

- Understanding the need to be safe at work
- Own responsibilities for keeping safe and others safe in the workplace, e.g. complete tasks safely, keep others safe, follow instructions, report procedures, know own limitations
- Employee responsibilities, e.g. take care of their own health and safety, complete health and safety training for work areas and online safety, comply with health and safety policies and procedures, maintain own health to be able to work effectively
- Employer responsibilities, e.g. legal responsibility under legislation to carry out risk assessments, ensure emergency procedures in place, provide staff training on keeping safe, reporting injuries, diseases and dangerous occurrences (RIDDOR); training for manual handling; provision of PPE

##### **Workplace health, safety and welfare**

- Factors that may affect health and safety implementation by employers, e.g. cost, time constraints, customer pressure
- Factors that may affect health and safety implementation by employees, e.g. peer group pressure, unrealistic targets, lack of equipment
- How to find out about workplace health and safety requirements, e.g. staff handbook
- How to follow given health and safety processes and legislation
- How to plan to maximise safety in a given scenario

- Sources of help and support for health and safety in the workplace, e.g. supervisor, health and safety officer, workplace documentation, signs, notice
- Sources of health and safety information, e.g. health and safety representative, colleagues with responsibility for health and safety such as first aider, fire marshal, trade union, policies and procedures, internet and intranet

### **Use of personal protective equipment (PPE)**

- PPE, e.g. provision of suitable PPE, well maintained, training on how to use it effectively

### **Ergonomics and manual handling**

- Ergonomics, e.g. basic definition, assessing workstations including display screen equipment

### **Risks, hazards and potential consequences**

- Risks, e.g. slips, trips, falls, hazardous substances, sprain, breaks, working at height, noise, electrical fault
- Hazards, e.g. biological, chemical, physical, safety, ergonomic, psychosocial, workload
- Consequences, e.g. accidents, injury, paying compensation, prosecution, life-threatening injuries, loss of job
- Definition of risks and hazards
- Reporting injuries, diseases and dangerous occurrences, e.g. work-related deaths and accidents, cases of industrial diseases, near-miss accidents, injuries to people not at work such as a member of the public
- Responsibility for carrying out risk assessments, e.g. individuals, team supervisor, employers
- Identify potential hazards and identify who may be harmed and how
- Evaluate risks and decide on controls, report and record findings
- Manual handling, e.g. manual handling techniques and when to use them
- Provision and use of work equipment, e.g. right equipment for the job, well maintained, training and instruction manuals
- Hazardous substances, fire and electricity, e.g. types of hazardous substances such as cleaning fluids, mechanical oil, garden fertilisers; hazardous signs, PPE, reducing risk of fire, safe use of electricity
- Working at height, noise and sound, e.g. risks posed, PPE

## **Skills**

### **Research**

- Research and collecting data, e.g. gathering relevant sources of information, identifying information, sharing information

### **Problem solving**

- Identifying the issues and suggesting solutions, e.g. assessing a work area, identifying relevant information and suggesting ways to mitigate the problem

### **Completing risk assessment**

- Complete a simple risk assessment using an appropriate template

### **Taking action to minimise risks and hazards**

- Suggest ways to minimise risks and hazards

## Assessment Criteria

<p><b>Learning aim A: Assess workplace health and safety requirements</b></p> <p>Evidence must include:</p> <p>Examples of the learner working safely during a working day, e.g. using personal protective equipment appropriately, ensuring their work station encourages good posture, lifting and moving heavy or awkward objects to avoid injury.</p>
<p><b>A.P1</b> Explain actions an employer must take to ensure the health and safety of their workers</p>
<p><b>A.P2</b> Evaluate own health and safety responsibilities in the workplace</p>
<p><b>Guidance for assessors</b></p>
<p><b>For A.P1</b> Learners must explain the various ways in which employers ensure their workers are safe in a given workplace, including relevant legislation, policies and procedures</p>
<p><b>For A.P2</b> Learners should evaluate health and safety related responsibilities they would have as an employee, in the chosen workplace. They must also describe steps they would follow and/or actions they would take to ensure these responsibilities are fulfilled</p>
<p><b>Learning aim B: Carry out a risk assessment and take action as appropriate</b></p> <p>Evidence must include:</p> <p>Completion of a risk assessment, identifying risks and hazards and how these can best be managed, specific to the selected working area and/or work-based task being assessed. Evidence should also include the carrying out of practical action to reduce or remove identified risks and/or hazards.</p>
<p><b>B.P3</b> Complete a simple risk assessment to identify and manage risks and hazards in the workplace</p>
<p><b>B.P4</b> Take practical action to minimise risks and hazards in the workplace</p>

### Guidance for assessors

**For B.P3** Learners will complete a risk assessment that identifies potential hazards, who may be harmed and how, precautions already in place, achievable actions to take and who is responsible for carrying out the actions, for a specific workplace or work-based task. Learners should share their findings with others, describing how they reached their conclusions

**For B.P4** Learners must take practical action to minimise risks and hazards in a given workplace or for a specific work-based task. This may include reporting faults or dangers that are outside of their control (e.g. broken equipment, leaking roof), moving equipment that may cause a hazard (e.g. chairs that have been left in the walkway), drawing people's attention to a potential risk or hazard (e.g. a concealed step)

## Delivery guidance

It is recommended that practical activities are used in the delivery of this unit to help learners develop both essential knowledge and skills. The following are suggestions for activities and workshops that can engage learners and be used in preparation for the final assessment. These are not intended as a definitive guide to cover the full GLH of the unit.

### **Activities: Introduction to unit**

Tutors introduce the unit by explaining the title and unit aims. Tutor to explain that throughout the unit, learners will have the opportunity to demonstrate their increasing knowledge about health and safety in the workplace, through practical workplace activities and/or during working experience.

Learners discuss why they think health and safety is important and consider the potential consequences of working in an unsafe environment. Learners carry out a sample risk assessment in their place of work or study to identify potential risks and discuss their findings in small groups.

**Suggested time:** about 2 hours

### **Activities: Health and safety responsibilities**

Employers to be invited to talk about the responsibilities they have and employee responsibilities. They provide an overview of relevant legislation and regulations that they must adhere to.

Following the talk, learners present a visual summary of the information that they gather. They create a chart showing key employer and employee responsibilities. Where possible, their presentations to be displayed in the learning area for reference throughout the unit. Alternatively, learners create a handout that is distributed to the class.

Working in small groups, learners discuss factors that might prevent employers and employees from complying with health and safety legislation and regulations. The outcomes to then be shared with the class.

Learners should consider the consequences of not adhering to health and safety legislation. Tutors may devise worksheets for learners to complete that help them to identify potential consequences, e.g. an employer has not organised for the fire extinguishers to have their annual safety check, an employee arrives late at work and misses the health and safety briefing.

Scenarios to be used to help learners understand the kind of pressure they may experience in the workplace, e.g. a colleague tells an inexperienced colleague that they only need to wear PPE when the supervisor is present. Learners consider the challenges the inexperienced colleague faces, what they should do and the potential consequences. A colleague experiences a serious injury at work that may result in them being unable to do that job again.

**Suggested time:** about 3 hours

**Activities: Risks and hazards**

Learners to create a word-wall of terms and words that they would associate with risks and hazards.

Tutor to provide a definition of 'risk' and 'hazard' and provide learners with a range of examples before encouraging them to come up with their own ideas and suggestions of possible risks and hazards.

Working in small groups, learners could begin by listing health and safety issues in their own class. Learners could use the information from their own lists to show the risks and hazards and be encouraged to identify additional risks and hazards that are not so obvious.

Learners could be given photographs of different working environments to identify potential risks and hazards in the workplace. Learners should identify the issues and suggest how these could be avoided or what action could be taken to resolve the issue.

Returning to their own workplace, learners could be given three different coloured stickers: red – serious risk, amber – medium risk, green – low risk. Learners could review their own working environment and place stickers on any serious, medium or low risks that they identify. Tutor to encourage the learners as a group to visually assess the room after the activity and discuss how safe they feel the room is.

Learners then review their activities from a different perspective, e.g. a person with mobility issues, a pregnant person, someone with a visual impairment. Learners to discuss if the risks change, or if there are further steps that are required to make the space safer.

**Suggested time:** about 3 hours

**Activities: Ergonomics, including display screen equipment**

Tutors provide a definition of the term 'ergonomics'. Learners could list the equipment that they think would be at a workstation. They then compare it with a tutor-devised handout, e.g. monitor, keyboard, software, telephone, printer, work chair and desk, work surface, noise level, lighting, temperature, space.

An occupational health advisor may be invited to talk about the impact of the workstation on employee's health. They may also outline employer's responsibilities such as arranging eye and eyesight tests, providing modifications to equipment to prevent repetitive injuries.

Learners download workstation assessment checklists and use it to assess their own workstation in an appropriate learning environment, e.g. classroom, library, learning resources suite.

Learners to be given scenarios describing workers who are experiencing discomfort at their workstation. Learners could research possible modifications to the workstation, e.g. a worker spends a lot of time on their keyboard and has sore wrists by the end of the day, a worker finds that their feet do not touch the floor when they are working at their computer.

Learners watch YouTube clips on how to assess their workstation. They could complete a short quiz to review learning.

**Suggested time:** about 3 hours

### **Activities: Personal protective equipment (PPE)**

As a group, learners discuss the purpose of PPE, when it is needed and its limitations.

Working in small groups, learners can identify PPE for a chosen work environment. Each group takes a different sector and shares their findings with the rest of the group to identify similarities and differences.

Tutor to explain that although some sectors have similar PPE the quality or standards of the PPE may be different. Tutor to use examples such as masks, gloves, eye protection and the differing standards between health sector and horticulture.

In small groups, learners to then create a life size body map. For each part of the body, the learners should suggest PPE that could be used. Learners should consider head, face and eyes, ears, hands, body and feet. Each group can then present their suggestions to the wider group and add to it following discussions. Tutors to explain that employers should provide training on how to use PPE.

Learners participate in a workshop that highlights the importance of caring for PPE, e.g. check it before using it, adjust it to fit, never use damaged PPE, keep it clean, store it appropriately, ask for replacements when required.

Learners to be provided with a range of PPE, including, where possible, different examples of the same type of PPE, for example gloves and masks. Learners to be provided with a job title/sector and work as a small group to put PPE on one of the learners to demonstrate what they feel is required. Learners to discuss their ideas.

YouTube videos to be used to demonstrate PPE in the workplace and correct use/wearing of PPE.

**Suggested time:** about 3 hours

**Activities: Manual handling**

Tutors begin by explaining that employers should provide training if employees are required to lift heavy or awkward objects as part of their job.

Learners to be given a box and asked to demonstrate how they would lift the box. The tutor will encourage learners to stop the role play and demonstrate their ideas of safer lifting where appropriate. The tutor will then demonstrate the safe methods of lifting and encourage learners to give it a go.

Learners begin by discussing situations where they lift and handle objects in their own home. They discuss what preparations they take and how they do it. They also share any experiences of injuring themselves whilst doing it and thinking through how it happened.

Guest speakers from different workplaces to discuss manual handling or employees who have suffered injury through inappropriate manual handling to meet with learners, where possible, to share their experiences.

Learners participate in a workshop on manual handling that cover the basic techniques. This includes how to prepare to lift heavy or awkward objects, lifting from the floor, carrying objects and placing objects.

YouTube videos to be used to demonstrate safe and unsafe manual handling within different workplaces.

Learners to demonstrate their knowledge and understanding by directing a peer through appropriate lifting and moving of objects.

**Suggested time:** about 3 hours

**Activities: Provision and use of work equipment**

Learners to be reminded that employers are responsible for providing appropriate and safe equipment in the workplace.

Learners take part in routine tasks that illustrate the safe use of equipment. Examples could be changing the height of a chair, using and cleaning kitchen knives, taking hot utensils from an oven, using an iron. Learners would need to consider appropriate PPE, preparation, use of the equipment and ensure it is left in a safe manner.

Learners visit different work settings to find out how to ensure the equipment they are using is safe, e.g. safe use of a wheelchair, using large equipment, garden tools and equipment. Learners may use Q&A to gather more information from employers and employees on how they use equipment safely in the workplace.

Learners discuss factors that may compromise the safe use of equipment, such as weather, experience of workers, age of equipment.

Tutor to demonstrate using various pieces of work equipment. Learners to identify safe and unsafe use and stop the role play where appropriate to demonstrate safe use.

**Suggested time:** about 3 hours

**Activities: Hazardous substances, fire and electricity**

Learners complete an interactive quiz showing different signs for hazardous substances, fire and electricity. They identify the meaning of signs shown and explain their meaning.

Learners carry out a walk around of their workplace to identify different signs that are visible and discuss why they are used and why they are located in specific areas.

Learners work in small groups to identify hazardous substances that may be used in different work settings. Each group works on one sector and then present their information to the group. Sectors could include hospitality, horticulture, motor engineering, public services.

Tutor to explain COSHH regulations to learners and ask them to think about the different substances that would be stored in the COSHH cupboard in a workplace due to health and safety. Learners to consider how some substances would not be stored securely at home but would in work.

Learners can research the different types of fire and fire extinguisher and, if possible, identify the location of different extinguishers and fire escapes within their workplace.

Representatives from the fire service could be invited to explain the different types of fire extinguishers and their uses and, where possible, demonstrate or show videos of extinguishers being used.

Learners create a checklist that identifies potential risks and hazards when using electricity, e.g. state of cord, plug, switch, adaptor, build-up of dust.

**Suggested time:** about 3 hours

**Activities: Working at height and with noise**

Tutors to lead a discussion of what is meant by working at height. They continue the discussion by considering what equipment may be used in order to work at height and what safety measures need to be put in place. The consequences of not adhering to safe practice to be considered.

Employees who regularly work at height could be invited to share their experiences and show how to do so safely.

YouTube videos showing people working at height can be used to demonstrate the safety measures taken. Learners could review video clips and list the safety measures before feeding back to the group.

Learners carry out research to find out the do's and don'ts of working at height. They then gather their findings and present their information to the group.

Tutor to lead discussion of how noise can cause significant harm to an employee in a workplace. Learners to continue the discussion by considering what different jobs are prone to high levels of noise and what safety measures could be taken.

Learners watch YouTube clips of protecting themselves when working in a noisy environment. They identify different job roles where noise is particularly relevant, what PPE is available to protect their hearing and how to care for the equipment.

Where possible, learners handle different types of equipment that may be used to protect their hearing in the workplace.

**Suggested time:** about 2 hours

### **Activities: Risk assessments**

Tutors begin the session by reiterating the purpose of carrying out risk assessments. Learners should discuss their experience of reading and producing risk assessments and consider where they have seen/used these before.

Learners should then research the key elements of risk assessments and what they mean. Learners can be directed to the HSE website for exemplar risk assessments and associated documentation. Learners should produce a definition sheet to show each element of a risk assessment with its definition for their own reference.

Learners will work as a small group to select an area of their workplace to risk assess. They can work on a risk assessment together to identify the challenging sections, e.g. evaluating the degree of risk and the more straightforward sections and present a draft copy to other groups for peer feedback.

Learners have the opportunity to complete different types of risk assessment templates initially in small groups but on their own when they have more confidence to do so. Risk assessments include assessing a workstation, use of PPE, lifting and moving heavy or awkward objects, using equipment safely, working at height with noise and sound.

Learners should at the end of the section rate their knowledge, understanding and confidence in completing risk assessments.

**Suggested time:** about 3 hours

### **Activity: Preparation for assessment**

The tutor reminds learners of the requirements of the assignment brief and answers any further questions that learners may have.

Group recap on key unit concepts and topics with the tutor using direct questioning to challenge learners and check understanding.

**Suggested time:** about 1 hour

**Activity: Post assessment**

Learners will take part in a group discussion to highlight the key points from the unit and how these can be used for their future progression.

Learners reflect on the notes they have produced from reference documents. They summarise what they have gained from the unit and how this will help them with their progression.

**Suggested time:** about 1 hour

## **Suggested assessment activity**

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set duration in which to complete the activity. The activity below is a suggested example. Centres are encouraged to design their own assessment activities based on the interests of the learner and the resources available locally.

### **Task**

Your task is to demonstrate that you can work safely in different work situations and can carry out a risk assessment of a chosen work area.

You will research the actions that employers must take to ensure the health and safety of their workers and consider your own health and safety responsibilities within the workplace to evaluate workplace requirements.

You will then use your findings to select a chosen workplace and carry out a risk assessment which you will document and demonstrate your skills by taking appropriate action to minimise risks and hazards identified.

### **Retake**

Learners could research a different workplace or working environment.  
Learners could be given an alternative workplace to risk assess.

## **Unit 13: Working as Part of a Team**

**Level:** 2

**Guided learning hours:** 35

**Total unit time:** 35

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### **Unit in brief**

The aim of this unit is for learners to work together towards achieving a common work-related outcome.

### **Unit introduction**

Organisations require people to work effectively in different teams in order to achieve tasks and projects. It is important to understand the key skills needed for an effective team and to be able to identify how each team member can contribute to a task and ensure their skills are utilised effectively. It is also important to identify barriers to teamworking and ways these can be overcome.

In this unit you will work in a team to complete a task. You will need to understand your role in the team, the roles of others and work together utilising each member of the team's skills effectively. At the end of the task you will review your own and the team's performance.

## Unit summary

Learning aim	Summary of suggested assessment evidence
<p><b>A</b> Evaluate successful teamworking</p> <p><b>B</b> Participate fully in a teamworking task</p>	<ul style="list-style-type: none"> <li>• An observation record confirming performance in a teamworking activity</li> <li>• A personal evaluation of own performance in a teamworking task</li> </ul>

### Key teaching and learning areas

Key teaching areas include:	
Knowledge	Skills
<ul style="list-style-type: none"> <li>• Different models of team and teamworking</li> <li>• Understand skills needed for effective teamwork and why they are important</li> <li>• Purpose and benefits of teamworking in the workplace</li> <li>• Barriers to teamworking and how they can be managed</li> </ul>	<ul style="list-style-type: none"> <li>• Teamwork</li> <li>• Planning</li> <li>• Interpersonal skills</li> <li>• Appropriate behaviour when working on a team task</li> <li>• Take on a range of roles within a team</li> <li>• Evaluate own and team performance</li> </ul>

## **Unit content**

### **Approach (how the learner should approach this unit)**

#### **Learners will need to:**

- Work effectively with others to achieve tasks and goals and complete a team task
- Communicate effectively with others to share ideas and suggestions
- Take personal responsibility for own skills and behaviours
- Respond positively to challenges and difficulties within a team task
- Be able to reflect on their learning experience for future teamworking situations

#### **Knowledge**

##### **Different models of team and teamworking**

- Traditional model: working physically in a team with one leader who is in charge and leads the team to reach their goals, e.g. call centres, front of house
- Task force model: specialists brought together for a specific time only with or without a leader, e.g. construction, research, sciences
- Cutting edge model: working together as a team without a single leader or authority figure where decisions are made collectively, e.g. art residencies, independent retailers
- Cyber team model: working together as a team virtually without any physical or face-to-face contact, e.g. digital projects, international construction, music sector
- Strategies for effective teamwork and team roles: shaper, implementer, completer, coordinator, team worker, investigator, plant, evaluator, specialist

##### **Understand skills and behaviours needed for effective teamwork and why they are important**

- Key skills needed for effective teamworking, e.g. listening, communicating, problem solving, compromising, decision making
- Key behaviours needed for effective teamworking, e.g. trust, accountability, commitment, positivity, creativity, innovation
- Why teamworking skills and behaviours are important, e.g. help people collaborate, make people feel valued, improve engagement, support more creative outcomes, lead to success
- Own skills and preferred roles within a team, e.g. matching skills to team roles
- Why it is important to evaluate own and team performance
- How to evaluate own and team performance

## **Purpose and benefits of teamworking in the workplace**

- Purpose of teamworking, e.g. generate new ideas, solve problems, builds morale, complete tasks more efficiently, resolve challenges
- Benefits of teamworking on employees, e.g. better working relationships, shared responsibility, provides support to people, helps people learn to develop skills and behaviours

## **Barriers to teamworking and how they can be managed**

- Barriers to teamworking and how they can be managed, e.g. dealing with difficult team members, working to deadlines, solving conflict and disagreements
- Knowing the impact of not completing the task
- How areas in need of development can be improved

## **Skills**

### **Teamwork**

- Take part in a teamworking activity
- Undertaking different roles within a team

### **Planning**

- Plan your role and how you will work with others in a teamworking activity
- Plan the team approach to teamworking tasks and steps required to succeed

### **Interpersonal skills/appropriate behaviour when working on a team task**

- Use appropriate communication to interact with other team members, share ideas and give feedback
- Use appropriate behaviours that demonstrate positivity, commitment and accountability

### **Evaluate own and team performance**

- Evaluate own and team performance
- Highlight teamworking strengths and areas for development
- Suggest ways to improve areas in need of development

## Assessment Criteria

### Learning aim A: Evaluate successful teamworking

Evidence must include:

An assessment of the importance of teamworking in a range of different work-based scenarios or environments, and an analysis of the skills and behaviours necessary for effective teamworking, including how and why each is necessary and what could be the impact of unsuccessful teamworking.

**A.P1** Assess the importance of teamworking in a range of work-based scenarios

**A.P2** Analyse the skills and behaviours needed for effective teamworking

### Guidance for assessors

**For A.P1** Learners will assess the importance of being able to work successfully as part of a team in a range of different work-based scenarios or environments, including the benefits for the employee and employer

**For A.P2** Learners will analyse the skills and behaviours that they feel are necessary for successful teamworking in a range of work-based scenarios or environments, including what each may 'look like', how and why each may influence the effectiveness of the team and what could be the negative outcomes if teams cannot work successfully together

### Learning aim B: Participate fully in a teamworking task

Evidence must include:

Participation in a work-based team task, undertaking a variety of roles within the team and showing appropriate skills and behaviours to enable effective teamworking and positive progress towards the final task outcome. Evidence must also include a personal evaluation of the skills and behaviours they used during the task, highlighting areas of strength and areas for development

**B.P3** Select and apply effective teamworking skills and behaviours when working with others to achieve a work-related task

**B.P4** Evaluate own performance in a work-related team task

### Guidance for assessors

**For B.P3** Learners will participate fully in a work-based team task, showing that they can take on the lead role at times, and step back to let others take the lead as necessary. Learners will show that they can display and/or use appropriate skills and behaviours in order to work successfully with other team members, knowing when to use each to benefit the team (e.g. when to speak, when to listen, when to give an opinion, when to allow others to give their opinion)

**For B.P4** Learners will evaluate their own performance in the team task, focusing on the skills and behaviours they showed/used in order to successfully interact with others and work towards the final aim of the task. Learners will highlight areas of strength as well as areas in need of development and suggest ways to develop weaker areas. Learners may use any/all of self-review, peer review, teacher/tutor review to reflect on their own performance

## Delivery guidance

It is recommended that practical activities are used in the delivery of this unit to help learners develop both essential knowledge and skills. The following are suggestions for activities and workshops that can engage learners and be used in preparation for the final assessment. These are not intended as a definitive guide to cover the full GLH of the unit.

### **Activities: Introduction to unit**

Tutor-led activity to introduce the requirements of the unit, including purpose, ways of working, expected personal learning outcomes and assessment methods.

Learners to work in small groups to identify as many different teams that they can think of using their own experiences as a starting point. Learners to feed back to the group to create a class list of different teams.

Tutor to provide the learners with examples of teams from around the world, some should be recognisable teams, others should require learners to research. Learners should then research and discuss what makes the team successful, what roles people play and what they feel are the strengths of the team.

Examples of teams include sports teams, Olympic teams, NASA Apollo 11 (science), Knights Templar (history), Rodgers and Hammerstein (music). Learners could also be provided with fictional teams to discuss, such as Sherlock and Holmes, The Avengers, The A Team.

**Suggested time:** about 2 hours

### **Activities: Advantages and disadvantages of working in a team**

Learners to each consider in small groups the advantages and disadvantages of working in a team based on their own experiences. Learners should rank their advantages and disadvantages into most important to least important and share their views with the group.

Learners could then devise a questionnaire to gather feedback of others on the advantages and disadvantages of working in a team. Learners should reflect on their findings and highlight the most common advantages and disadvantages stated. Learners to discuss the outcomes as a group.

Tutor to provide learners with a range of different work-place scenarios. Learners to work in pairs to select scenarios and provide pros and cons of working in a team for each scenario.

Learners should then create an individual reference sheet with key advantages and disadvantages to support their learning and understanding.

**Suggested time:** about 3 hours

### **Activities: Success and failure of teams**

Learners to be asked to identify the skills and behaviours that make a successful team. Learners should work together to create two lists of skills and behaviours and share these in discussion.

Learners to then work in pairs to create the ideal team worker. Learners should make a list of the skills and behaviours that they would want from a member of their team and present this to another pair in the class. Learners to then review another pair's list and identify which they possess and which they would need to improve on. Learners should be encouraged to discuss their choices and selections.

Learners to then work in small groups to identify a list of ten reasons that they feel teams can fail. Learners should think about their own experiences, barriers that teams could face and external challenges that could impact on their success.

Learners to present their ten reasons in a short presentation. For each point raised, learners should question their peers about how this could present as a factor of failure. Learners presenting should use examples of real team failures, where possible.

Learners watch videos or extracts from TV programmes that involve teamworking where the teams are completing a task. They are asked to make notes on why the teams were successful or not identifying skills, behaviours and barriers.

Learners to finally work in small groups to identify the groups skills, behaviours and potential barriers to success. Learners should then identify ways of overcoming the barriers identified and share these in discussion. Learners could make a list of barriers and ways of overcoming these as a reference point for future learning.

**Suggested time:** about 4 hours

### **Activities: Models of teamworking**

Tutor to provide an overview of the four key models of teamworking: traditional, taskforce, cutting edge and cyber.

Learners should then work in four groups to explore one of the models and create a presentation to highlight the strengths, weaknesses and benefits of each model. Learners could then present this to the group and ask questions to gain a deeper understanding.

Learner could then interview different people in their college or workplace to identify what models of teamworking people have experience and their feelings about each one, its benefits and its barriers. Learners should discuss their findings as a whole group.

Finally, learners could be provided with a range of different workplace scenarios and decide which model of teamworking would be the best to ensure a positive outcome and success.

**Suggested time:** about 3 hours

**Activities: Exploring team roles, skills and behaviours**

Learners to be asked to identify some of the key roles within a team based on their experiences and understanding. Learners could identify roles that they have undertaken within a team and consider different teams and different titles of roles within teams.

Learners to discuss the importance and need for leadership within a team. Learners to debate whether a leader is needed to achieve success in teamwork. Learners should be encouraged to take different viewpoints. Questions that could be asked include: could everyone not work together to lead? What if no one made decisions could the team be successful? Who would decide what to do next without a leader?

Learners to review the video shown in the teamworking activity and lead a discussion on some of the leadership skills seen and some of the problems that can be encountered. In small groups, learners to identify the behaviour and skills of a leader and research different types of leaders. Learners could feedback their thoughts in group discussion.

Tutor to introduce learners to Belbin's team roles, providing an overview of each role, its purpose and its barriers/challenges. Learners could then each select a role at random and research the role to create a one-page profile of their chosen Belbin role. These could be displayed in the classroom for reference.

Learners could collectively review the skills and behaviours identified as positives within each one-page profile and create a detailed list of skills and behaviours needed for success.

Learners could create checklists of the skills and behaviours for each role and then interview a range of people to identify what the most common roles are within groups of people. Learners could present their findings in a format of their choice.

Using an online questionnaire, learners could identify and gather results about their own skills and qualities in relation to Belbin's team roles to highlight which roles suit them most. Learners should then work as a whole group to create the 'perfect' Belbin team based on the nine roles.

**Suggested time:** about 5 hours

**Activities: Team development**

Learners to each select a personal experience of working in a team and share it with others in small groups. Learners should highlight the challenges and strengths of the team and discuss the team performance over time. One learner from each group will then communicate their experience and the tutor will map it as a continuum line on a flipchart with high points being successes, and low points being challenges.

Tutor to provide learners with an overview of the four stages of team development: forming, storming, norming and performing. Learners to work in pairs to identify what they feel each stage is about and what it means to the team and its development. Learners to share their thoughts on four flipcharts (one for each stage). Learners to discuss their thoughts.

Learners to review each of their shared experiences and apply the four stages of team development to explain and justify the way that the team were performing.

Learners could be shown video clips of different teams in action. Learners should be encouraged to collectively agree what stage of team development the video clip is demonstrating.

Finally, learners could reflect on each stage of team development and consider actions that they would take to overcome challenges or encourage improvement in the team.

**Suggested time:** about 4 hours

**Activities: Code of conduct/setting team ground rules**

The tutor explains to the group that one of the ways of overcoming barriers and reducing problems in teams is to create a code of conduct.

Learners discuss the advantages of having a code of conduct and the types of areas that should be detailed, including consultation with others, listening to and valuing others' views and opinions, gaining agreement and consensus, following agreed pathways.

Learners should research different codes of conduct for teamworking using online platforms, face-to-face research with employers, workplaces and other professionals and students. Learners should identify similar and consistent rules as well as those that are specific to a given workplace.

Tutor to ask learners to consider what the consequences are of not having a code of conduct and team ground rules. Learners to reflect on their opinions and apply them to given workplace scenarios to identify the potential outcomes without rules and codes of conduct. Learners should be encouraged to discuss how they would deal with someone who was not following the code of conduct.

Learners should then work in teams to negotiate and agree ways of working and draft a code of conduct and ground rules to follow when completing team tasks. Learners should display their agreed code of conduct in the classroom.

Learners asked to produce a code of conduct that they use for the final assessment.

**Suggested time:** about 4 hours

### **Activities: Barriers to teamworking**

Tutor to ask learners to discuss the barriers to teamworking considering their own experiences and challenges reviewed within previous sessions. Learners to create a group mind map of potential barriers. Learners should be encouraged to consider different sectors of work and the barriers that could arise specifically in one sector.

Video clips from YouTube could be used to showcase barriers and breakdowns in teamworking. Learners could reflect on the video clips and add further suggestions to their mind map.

Guest speaker to be invited to speak to learners about dealing with conflict and challenge within teams and how to overcome barriers in teamworking. Learners could prepare situations and scenarios to pose to the guest speaker to explore how they would deal with such challenges.

Finally, learners could each consider a single barrier to teamwork and identify ways of overcoming the barrier and managing the outcome successfully. Learners to share their ideas with the group.

**Suggested time:** about 3 hours

### **Activity: Preparation for assessment**

The tutor reminds learners of the requirements of the assignment brief and answers any further questions that learners may have.

Group recap on key unit concepts and topics with the tutor using direct questioning to challenge learners and check understanding.

**Suggested time:** about 1 hour

### **Activity: Post assessment**

Learners will take part in a group discussion to highlight the key points from the unit and how these can be used for their future progression.

Learners reflect on the notes they have produced from reference documents. They summarise what they have gained from the unit and how this will help them with their progression.

**Suggested time:** about 1 hour

## **Suggested assessment activity**

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set duration in which to complete the activity. The activity below is a suggested example. Centres are encouraged to design their own assessment activities based on the interests of the learner and the resources available locally.

### **Task**

Your task is to evaluate successful teamworking and use your knowledge to demonstrate effective teamworking skills within a team task.

You will need to explore a range of different work-based scenarios to analyse the skills and behaviours needed to achieve effective teamworking and outline the importance of teamwork within each scenario. You should present your findings in a format of your choice.

You will then be provided with a work-related team task which you will complete with a team of your choice. You should demonstrate effective skills and behaviours for teamwork and evaluate the success of your team working and reflect on your own performance.

### **Retake**

The learner could explore different work-based scenarios and take part in an alternative work-related team task.

# **Unit 14: Anticipating and Meeting Customer Needs and Expectations**

<b>Level:</b>	<b>2</b>
<b>Guided learning hours:</b>	<b>35</b>
<b>Total unit time:</b>	<b>35</b>

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## **Unit in brief**

The aim of this unit is for learners to explore the skills needed to work with customers and demonstrate how to deal with customer service issues.

## **Unit introduction**

In any working environment you will be involved in dealing with internal or external customers in a variety of situations, some situations will be routine, others may be more challenging. This unit will help you develop the skills and understanding to identify customer expectations and needs and enable you to respond in appropriate ways to different customer service situations.

This unit will help you to consider the meaning of customer service. You will investigate different customer service situations to identify customer needs and expectations and explore ways of dealing with customers professionally including challenging situations.

In this unit you will identify customer needs and expectations and explore how to deal with them effectively. You will identify key customer service issues including complaints and problems and determine appropriate solutions.

## Unit summary

Learning aim	Summary of suggested assessment evidence
<p><b>A</b> Understand customer needs and expectations</p> <p><b>B</b> Apply skills and knowledge to meet customer needs and expectations</p>	<ul style="list-style-type: none"> <li>• A summary of the customer needs</li> <li>• Filmed or voice recorded exchange, written transcript of a role-play scenario or written notes of evidence that was seen and heard</li> </ul>

### Key teaching and learning areas

Key teaching areas include:	
Knowledge	Skills
<ul style="list-style-type: none"> <li>• Customer needs and expectations</li> <li>• Core customer service skills and behaviours</li> <li>• How to identify customer needs</li> <li>• How an organisation could meet customer needs</li> <li>• How an employee can meet customer needs</li> <li>• How customer needs will vary in different scenarios or sectors</li> <li>• The benefits of providing good customer service</li> <li>• How to deal with customer service issues</li> </ul>	<ul style="list-style-type: none"> <li>• Identify customer needs</li> <li>• Decide appropriate action/s in light of information given by the customer</li> <li>• Follow organisational procedure where necessary</li> <li>• Taking responsibility for own actions</li> </ul>

## **Unit content**

### **Approach (how the learner should approach this unit)**

#### **Learners will need to:**

- Work and communicate effectively with others
- Recognise the importance of positive and effective non-verbal communication, e.g. smiling
- Be considerate of other feelings and viewpoints
- Be patient and understanding of the needs of others, including customers
- Demonstrate confidence in dealing with challenging situations, queries and complaints

### **Knowledge**

#### **Customer needs and expectations**

- Definition of a customer, e.g. someone who requires goods or a service
- Types of customer, e.g. internal, external, face to face, online, telephone
- Customer characteristics, e.g. loyal, impulsive, discount-focused, need-based, wandering
- Customer needs, e.g. information about products/services, support in selecting products, advice and guidance
- Customer expectations, e.g. friendly and approachable, knowledgeable, keen to help, empathetic
- Importance of being knowledgeable when dealing with customers
- How customer needs will differ in different work-based environments, scenarios and sectors

#### **How to identify and meet customer needs**

- How to identify customer needs, e.g. asking questions, listening
- How an organisation could meet customer needs, e.g. organisational policy, appropriate staffing
- How an employee can meet customer needs, e.g. being friendly, approachable, helpful, seeking solutions, being knowledgeable

## **The benefits of providing good customer service**

- The benefits to the organisation, e.g. increased sales, reduction in complaints, customer loyalty, more effective workforce
- The benefits to employees, e.g. job satisfaction, increased motivation, better working environment, positive feedback, potential for rewards and recognition
- The benefits to customers, e.g. customer satisfaction, feeling valued and respected, more enjoyable experience

## **How to deal with customer service issues**

- How to use own initiative to meet customer needs
- Importance of taking responsibility in a given situation
- Knowing limits of own role
- Importance of following organisational processes where relevant, e.g. complaints policy, lines of reporting

## **Skills**

### **Customer service**

- Demonstrating product knowledge and awareness
- Use techniques to read and identify customer needs and expectations
- Use patience and persuasion to support customers and provide excellent service

### **Interpersonal skills/appropriate behaviour when working with customers**

- Use appropriate communication to interact with other individuals, share ideas and give support
- Use appropriate behaviours that demonstrate positivity, commitment and accountability

### **Problem solving**

- Problem solving, e.g. assessing customer needs, issues, complaints, identifying relevant information and suggesting ways to mitigate the problem

### **Decision making**

- Decide appropriate action/s in light of information given by the customer
- Acting in the best interests of the customer and organisation

## Assessment Criteria

<p><b>Learning aim A: Understand customer needs and expectations</b></p> <p>Evidence must include:</p> <p>An explanation of the various needs and expectations customers might have in a range of work-based scenarios, and an explanation of the personal skills, knowledge and behaviour that an employee might need, in these same work-based scenarios, to meet or exceed customer needs and expectations.</p>
<p><b>A.P1</b> Explain the needs and expectations that customers might have in a range of different work-based scenarios</p>
<p><b>A.P2</b> Explain the skills, knowledge and behaviour that may be necessary in order to meet or exceed customer needs and expectations in a range of work-based scenarios</p>
<p><b>Guidance for assessors</b></p>
<p><b>For A.P1</b> Learners will explain – including ‘what’ and ‘why’ – likely customer needs and expectations in work-related scenarios or workplaces</p>
<p><b>For A.P2</b> Learners will explain the skills, knowledge and behaviour that they would need as an employee in the previously identified work-related scenarios or workplaces, to be able to meet and/or exceed customer needs and expectations</p>
<p><b>Learning aim B: Apply skills and knowledge to meet customer needs and expectations</b></p> <p>Evidence must include:</p> <p>Demonstrations that show the learner anticipating and establishing what customers’ needs and expectations are by using appropriate communication skills. Evidence must also include the learner demonstrating that they can select and use appropriate skills, knowledge and behaviour to meet these same customers’ needs and expectations.</p>
<p><b>B.P3</b> Communicate effectively with customers to anticipate and establish their needs and expectations</p>
<p><b>B.P4</b> Select and apply appropriate skills, knowledge and behaviours to meet a range of customers’ needs</p>

### Guidance for assessors

**For B.P3** Learners should demonstrate that they can use effective communication skills (e.g. asking questions, active listening, open and confident body language, eye contact) to anticipate and establish customers' needs and expectations in work-based scenarios or real-life work situations

**For B.P4** Learners must demonstrate that they can meet customers' needs and expectations in role play, work-based scenarios or real-life work situations. These should include expectations, such as a friendly demeanour and willingness to help, as well as a specific stated need, e.g. an answer to a question or advice on a specific product or topic. Learners should show that they can select and use appropriate skills, knowledge and appropriate behaviours to benefit the situation

## Delivery guidance

It is recommended that practical activities are used in the delivery of this unit to help learners develop both essential knowledge and skills. The following are suggestions for activities and workshops that can engage learners and be used in preparation for the final assessment. These are not intended as a definitive guide to cover the full GLH of the unit.

### **Activities: Introduction to unit**

Tutor-led activity to introduce the requirements of the unit, including purpose, ways of working, expected personal learning outcomes and assessment methods.

Learners to create a word-wall of terms, words, themes and images that link to 'customer service'. Learners could add their own experiences of customer service, add pictures of themselves delivering customer service or add singular words.

Learners could then work in small groups to think about all the different places that they experience customer service and share these with the wider group.

Tutor to display a 'good vs bad' board and to explain to learners that every time throughout the unit that they experience good or bad customer service that they should add a Post-it note to identify where it was and say why it was good/bad. Learners should all add one Post-it note to the board to start.

**Suggested time:** about 2 hours

### **Activities: What is customer service?**

Learners individually define customer service before sharing their ideas with others in a small group. Learners then work with others to agree a small group definition, before sharing with the whole group to agree one singular definition of customer service.

Learners could then ask a series of different people 'what does customer service mean to you?'. Learners could use this information to add further points to their word-wall and to highlight similarities and differences in what people think and feel.

Learners to consider why customer service means different things to different people and share their ideas.

Learners will then work in pairs to create a set of 'job cards' showing different jobs or different actions in jobs where customer service may occur. Learners will then work with other pairs to separate their cards into different sectors of employment to identify where most customer service is provided. Learners should consider hospitality and events, sales and retail, health and social care, transport and logistics, public services, digital media and ICT, environment and agriculture, charity sector, leisure sport and tourism.

As a group, learners will then reflect on their sectors and discuss why some have less examples. Learners should consider whether this is because the role doesn't involve customer service, or whether it is because customer service is not as evident in those roles.

Learners to then reflect on the statement 'Customer service is everywhere, in every job and in every sector'. Learners to share their ideas within a group debate. Learners to agree on a collective response to the statement.

**Suggested time:** about 4 hours

### **Activities: Types of customers**

Tutor to review the group definition to 'customer service' and ask learners to think about how they would now identify a customer. Learners could consider their thoughts to the statement 'everyone is a customer' and discuss this as a group.

Learners to be provided with a series of cards with common segmentation factors, such as age, gender, nationality, ethnicity, religion, class, wealth. Learners should discuss in small groups which of the cards are most beneficial when separating customers and identifying trends or themes. Learners should justify their choices.

Learners could visit a local shop or retail area and observe the different customers that access a particular shop over time to identify common factors of customers based on those selected in the activity. Learner should then reflect on their findings and discuss the benefits of the information they have gathered – what does it tell you? How could you use the information? Does it show that there are different groups of customers?

Learners will work in pairs to select a well-known brand. Learners should then work together to create a customer profile for the brand, considering type of customer, age, gender, wealth, background. Learners should then present their findings to the group for discussion and feedback.

Tutor to provide learners with an overview of the five different customer characteristics. Learners to then work in small groups to create an information sheet which can be displayed in the classroom based on one of the five characteristics. Learners should think about what that customer may want or expect and add this to their information sheet.

Learners to individually think about times and examples when they have demonstrated each of the characteristics. Learners should then share their examples with the rest of the group.

Learners could finally be provided with a range of scenarios to describe a potential customer for them to identify what type of customer they are, which customer characteristic they have and suggest what product/service they may be looking for. Tutors could start to explore customer needs within this activity to prepare learners for future sessions.

**Suggested time:** about 5 hours

### **Activities: Customer needs and expectations**

Learners to be provided with a flipchart to thought shower customer needs. Learners should be encouraged to think about their own needs when they have accessed retail settings or restaurants. The tutor may give examples to support, e.g. need for information, need for guidance, product/service need. Learners to feed back.

Tutors explain the differences between needs and expectations using examples from learners' own experiences displayed on the word-wall and the previous activity. Learners should provide further examples and discuss their thoughts.

Learners to be asked to select a particular organisation or sector and detail what they think the customer expectations and needs would be for that organisation, they complete the activity in groups, examples could include:

- Transport company – operating on time, be able to purchase tickets online, face to face, delay repay policy.
- Hairdresser/barber – flexible hours, use of certain products, experienced stylists, additional services, such as beauty therapies/beard trimming or styling.
- Department store – weekend, late night opening, offers, loyalty cards, refunds, returns, online purchasing.

Learners to be shown a series of well-known businesses and asked to share their expectations and needs of each. Businesses could include McDonalds, Under Armour, Nike, Apple, Ford, but should include a variety of qualities and levels of luxury/pricing.

Tutor to provide learners with an overview of how people form expectations through experience, listening to others and watching media. Learners to reflect on the 'good vs. bad' board that they have been adding to and discuss their expectations of some of the businesses based on what others have said.

Tutor to ask learners to consider 'is the expectation accurate and fair when it is based on someone else's opinion not your own?'

Learners to then revisit customer characteristics and in small groups select one of the five characteristics. Learners will then explore the needs and expectations of customers based on their characteristic, e.g. loyal customers expect to feel valued and rewarded, impulsive customers need persuasion and cheap prices, need-based customers want products instantly and expect accurate advice, discount-focused expect low prices and offers, wandering customers expect calmness and relaxed experiences. Learners to share their findings with the group.

Learners to then review the previous activity and identify common needs and expectations of customers. Learners could then use this information to discuss how they could meet common needs and expectations of customers, sharing and discussing their ideas in small groups.

**Suggested time:** about 5 hours

**Activities: First contact**

Learners to discuss what makes a good first impression when they are customers, and what makes a bad first impression. Learners could work together to create a group display.

Learners to be split into three groups and given a flipchart with either face to face, telephone or online. Learners should work in a group to identify the ways that first impressions can be positive when interacting with customers using their chosen method. Learners should then rotate around the methods to add their thoughts to all three before discussing as a group.

Tutor to provide learners with a series of work-based customer service scenarios. Learners should work in pairs to review the scenario and explain how they would respond and react to make a good first impression to the customer.

Learners could role play different behaviours, interactions and presentations to highlight good and bad first impressions based on their own experiences.

Learners could then create a checklist of actions that help to make the best first impression to customers. Learners could visit different customer service locations and complete their checklist. Learners could then share their findings and discuss why specific actions aren't being used and why this could be.

Learners to also consider if first impressions and staff behaviours are different or similar across settings.

Finally, learners could create simple flowcharts in pairs to show the process that they would take when first interacting with customers in different formats. Learners could share their flowcharts for face to face, telephone and online and compare these with others in the group.

**Suggested time:** about 3 hours

**Activities: Win-win**

The tutor explains that when dealing with customer service issues it is important to aim for a win-win situation so that both parties are satisfied, which might involve negotiation.

Learners to discuss in small groups how they could ensure a win-win situation and what skills they may need to use to achieve this outcome, e.g. listening, empathy, problem solving, negotiation, persuasion.

Learners to be asked to identify situations and share where they have experienced win-win and share these with the group. Learners could then question each other on what skills and approaches the customer service agent used to achieve win-win.

Tutor to provide learners with a flipchart identifying the organisation, the employees or the customers. Learners to work in three groups to rotate around the flipcharts and identify different benefits of providing good customer service and achieving win-win to the identified group.

Learners to work in small groups to discuss the possible consequences and impacts of not achieving win-win. Learners should consider times when they have felt that they have lost as the customer and what impact this has had. Learners to share their points in discussion.

Tutor to show the group an optical illusion picture where there are two possible images (for instance, an old and a young lady) to be seen and the learners could identify which image they can see; the tutor can emphasise that everyone views things differently and that win-win cannot always be achieved.

Learners could be provided with different scenarios of customer service experiences that are win-lose. Learners should review the scenario and identify resolutions to move the situation to win-win. Learners should also consider resolutions that improve the situation but will not support win-win, e.g. a customer wants a refund but the company policy will not allow a refund to be provided.

**Suggested time:** about 4 hours

**Activities: Dealing with challenging customers, complaints and queries**

The tutor introduces the learners to the problem-solving process in customer service, e.g. identifying the problem by liaising with the customer, establishing the customers' needs, looking at possible solutions within the limits of own authority and organisational procedures, determining suitable solutions.

Learners to work in small groups and each select one of the stages in the process to research. Learners could create a short fact sheet on that part of the process and share this with the group to create a detailed process with pointers to display in the classroom.

YouTube videos can be used to showcase challenging customers in different workplaces. Learners could reflect on the videos and discuss their thoughts on how the situation could be de-escalated or resolved by the staff member.

Learners should then reflect on when they feel they would need to pass on challenging customers, complaints or queries to other members of staff and justify their reasons in small group discussion.

Guest speakers could be invited to discuss their own experiences of dealing with challenging customers, complaints and queries and to share their top tips on resolving issues within customer service.

Learners to research different complaints policies from a range of organisations and discuss the similarities and differences. Learners to identify how the policy protects customers and staff.

The learners to be given several scenarios with different problems to review and discuss in pairs. Learners to consider how they would deal with problems which could be face to face, online or on the telephone. Learners could role play their response and behaviour to demonstrate the best approach to use and peer review performance.

Learners could then develop their own situations and scenarios and direct others on how to respond and deal with issues to demonstrate their knowledge and understanding.

Learners will review their 'good vs bad' board and discuss what it has demonstrated, e.g. there are more good than bad, there are more bad than good. Learners could then review the bad experiences and discuss in pairs how they could overcome these and turn the situation around for customers.

**Suggested time:** about 5 hours

### **Activity: Preparation for assessment**

The tutor reminds learners of the requirements of the assignment brief and answers any further questions that learners may have.

Group recap on key unit concepts and topics with the tutor using direct questioning to challenge learners and check understanding.

**Suggested time:** about 1 hour

### **Activity: Post assessment**

Learners will take part in a group discussion to highlight the key points from the unit and how these can be used for their future progression.

Learners reflect on the notes they have produced from reference documents. They summarise what they have gained from the unit and how this will help them with their progression.

**Suggested time:** about 1 hour

## **Suggested assessment activity**

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set duration in which to complete the activity. The activity below is a suggested example. Centres are encouraged to design their own assessment activities based on the interests of the learner and the resources available locally.

### **Task**

Your task is to explore the needs and expectations of different customers within a range of work-based scenarios and then demonstrate your skills in communicating with customers to meet their needs.

You will be provided with examples of different work-based scenarios that involve customers. You will need to review the scenarios and explain the needs of the customers, their expectations, and the skills, knowledge and behaviours required to meet or exceed these.

You will then need to demonstrate how you would anticipate, establish and meet different customers' needs and expectations in a series of role-play activities.

### **Retake**

The learner could explore different work-based scenarios to identify needs and expectations, and role play alternative customer-facing situations to demonstrate skills.

# **Unit 15: Managing Work-related Problems**

<b>Level:</b>	<b>2</b>
<b>Guided learning hours:</b>	<b>35</b>
<b>Total unit time:</b>	<b>35</b>

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## **Unit in brief**

The aim of this unit is for learners to respond appropriately to situations or issues that may arise in the work environment.

## **Unit introduction**

Being able to respond appropriately to different work-related situations and issues is a key skill and valued by employers. You need to be able to analyse the problem, know what action to take and assess the success of your actions.

In this unit you will have the opportunity to consider a range of work-related situations that need you to respond in an appropriate way. You may need to decide to challenge decisions being made, perhaps do nothing and accept the situation or take steps to resolve the situation.

## Unit summary

Learning aim	Summary of suggested assessment evidence
<p><b>A</b> Examine the causes and impact of work-related problems</p> <p><b>B</b> Develop strategies to manage work-related problems</p>	<ul style="list-style-type: none"> <li>• Tutor and/or supervisor observations, audio, video or photographic evidence</li> <li>• Written or otherwise recorded action planning</li> </ul>

### Key teaching and learning areas

Key teaching areas include:	
Knowledge	Skills
<ul style="list-style-type: none"> <li>• Work-related situations and issues</li> <li>• Benefits of solving work-related solutions and issues</li> <li>• Ways to assess issues by examining information available</li> <li>• Potential obstacles</li> <li>• Decision making</li> <li>• Inappropriate behaviours that create situations</li> <li>• Own attitudes and behaviours</li> <li>• How to create strategic action plans</li> </ul>	<ul style="list-style-type: none"> <li>• Communication</li> <li>• Self-management and development</li> <li>• Problem solving</li> </ul>

## Unit content

### Approach (how the learner should approach this unit)

#### Learners will need to:

- Work and communicate effectively with others to resolve problems and discuss solutions
- Recognise the need to appreciate others' points of view and opinions
- Recognise the importance of considering a range of options and approaches when solving problems
- Work creatively and innovatively when identifying resolutions to workplace problems

#### Knowledge

##### Work-related situations and issues

- Relationships with colleagues, e.g. respecting other peoples' opinions and experience, confidence to share own ideas and express opinions, experiencing inappropriate behaviour from colleagues, receiving misinformation
- Relationships with customers, clients, suppliers, e.g. dealing with challenging situations and knowing when to ask for help, using different communication skills to gather detailed information
- Personal issues, e.g. understanding how own behaviour and attitude can create or exacerbate a situation, negotiating pay and conditions with managers
- Operational issues, e.g. changes to working practices, a new product is introduced to the stock, changes in the law, diagnosing faults and repairing equipment
- Cause of work-related situations and issues, e.g. communication breakdown, procedures not followed, equipment not properly maintained, gossip, personality clashes, self-induced, e.g. personal attitudes and behaviours
- Impact of work-related problems on stakeholders, e.g. employees, employers, customers

##### Benefits of solving work-related solutions and issues

- Problem-solving strategies: logical stages of the problem-solving process, e.g. identify the problem, gather information using different sources of help
- Ways to solve different types of problems, e.g. read user manual for an IT-related problem, discuss with a manager regarding a disagreement with a colleague

- Employee benefits to solving problems, e.g. demonstrates independence, creativity, logical thinking, initiative, negotiation skills
- Employer benefits to solving problems, e.g. reduce costs, increase efficiency and delivery times, positive morale/teamwork, quality outputs/services

### **Ways to assess issues by examining information available**

- Assessing situations and issues by gathering relevant information, e.g. communicate with colleagues, access different sources of help and advice, refer to workplace policies and procedures
- Sources of help, e.g. colleagues, workplace procedure manuals, user instructions, HR department
- Criteria to measure success, e.g. asking others for feedback, the equipment functions appropriately, the task was completed on time

### **Decision making**

- Decision making, e.g. analytical, directive, conceptual, behavioural
- Stages of decision making: identify the problem, gather information, consider possible solutions, decide on the most appropriate option, implement actions, evaluate outcomes
- Importance of knowing own limitations and that of the team, e.g. limited resources to achieve deadlines, lack of appropriate skills or specialist knowledge

### **Potential obstacles**

- Potential obstacles, e.g. having fixed ideas, 'jumping' to conclusions, lack of empathy with others, misdiagnosis, assuming the same solution can solve all problems
- Inappropriate behaviours, e.g. not completing work to the required standard, gossiping and blaming others, inappropriately passing on work to others, taking long breaks, hiding mistakes, misusing equipment, stealing equipment
- Dealing with inappropriate behaviours, e.g. reviewing performance, informal meetings, personal action plans, goal setting, warnings, disciplinary proceedings

### **Own skills and behaviours for problem solving**

- Personal skills needed to solve problems, e.g. planning, time management, prioritising tasks, analytical skills, creative thinking, resilience, influencing skills, empathy, digital skills, organisation, self-management
- Personal behaviours needed when problem solving, e.g. being flexible, adapt to change, cooperate with others, negotiate, respectful, appreciative, honesty, reliability, assertive, level-headed

## **How to create strategic action plans**

- Use of action plans and set processes to support the resolving of work-related problems
- Six steps to action planning: define the problem, collect information, prioritise, set goals and objectives, implement solutions, monitor and evaluate

## **Skills**

### **Communication**

- Developing personal communication skills, e.g. listening to information, asking questions to gather information

### **Problem solving**

- Identify the issues and providing solutions, e.g. identifying relevant information, considering options and suggesting ways to mitigate problems and issues

### **Self-management and development**

- Developing self-awareness, e.g. prioritising tasks, managing own behaviour, empathy

### **Interpersonal skills**

- Personal social skills, e.g. assertive, resilient, flexible, positive interaction with others, ability to give and accept feedback, empathy, respect

## Assessment Criteria

<p><b>Learning aim A: Examine the causes and impact of work-related problems</b></p> <p>Evidence must include:</p> <p>Analysis of the factors which could cause work-related problems, in a range of different working environments or scenarios, and an explanation of the potential impact for all stakeholders if problems are not resolved.</p>
<p><b>A.P1</b> Analyse factors which could cause work-related problems in a range of scenarios</p>
<p><b>A.P2</b> Explain the potential impact of unresolved work-related problems</p>
<p><b>Guidance for assessors</b></p>
<p><b>For A.P1</b> Learners should analyse factors that could cause work-related problems in work environments or scenarios. Learners should consider how the work environment might affect the nature of the problem, e.g. customer facing versus back office, working as part of a big team versus working with one other person, working for multiple people (e.g. freelance) versus working for one manager</p>
<p><b>For A.P2</b> Learners should explain (including both 'how' and 'why') the potential impact of work-related problems on all stakeholders (e.g. employee, employer, customer). This might include frustration at not being listened to, annoyance that they might have to do extra work, poor working relationships, reduced efficiency and effectiveness, reduced takings</p>
<p><b>Learning aim B: Develop strategies to manage work-related problems</b></p> <p>Evidence must include:</p> <p>An evaluation of strategies that can be used to resolve work-related problems and/or to reduce the likelihood of them happening in the first place/again. Evidence must also include action plans, produced by the learner, that are followed to resolve identified work-related problems.</p>
<p><b>B.P3</b> Evaluate a range of strategies that could be used to resolve work-related problems</p>
<p><b>B.P4</b> Develop strategic action plans to manage a range of work-related problems</p>

### Guidance for assessors

**For B.P3** Learners will evaluate ways in which work-related problems could be avoided and/or resolved in work scenarios or environments. These might include strategies such as ensuring instructions are clear, fostering an atmosphere which is supportive and encourages people to ask questions, having clear lines of accountability, having appropriate management systems

**For B.P4** Learners must develop action plans which could be followed in order to resolve identified work-related problems in work environments or scenarios, including steps to take to avoid the problems occurring again in the future. The action plans should be clear, realistic and achievable and can be recorded in any appropriate format. Learners will decide if any steps could be carried out at the same time, identify resources required, and who will carry out each step of the plan, and identify potential issues that may prevent the plan from being successful

## Delivery guidance

It is recommended that practical activities are used in the delivery of this unit to help learners develop both essential knowledge and skills. The following are suggestions for activities and workshops that can engage learners and be used in preparation for the final assessment. These are not intended as a definitive guide to cover the full GLH of the unit.

### **Activities: Introduction to unit**

The tutor begins the session by explaining the unit title and the aims of the unit. Learners participate in a small group discussion to explore different types of situations and issues that they have experienced. Examples to come from part-time or voluntary work or situations and issues that have arisen in the class. The group then present their findings to the larger group.

Learners identify different types of work situations and/or issues that may occur in the workplace. If possible, their responses to be recorded on large sheets of paper that are then retained for future reference or added to as the unit progresses. There is a focus on four different areas, e.g. relationships with co-workers, relationships with customer, clients or suppliers, personal issues and operational issues.

As this is potentially a sensitive topic, particularly when discussing others' involvement in creating situations and issues in the workplace, it would be important to spend time discussing and recording appropriate ground rules for the group. Examples include the need to respect others' opinions, be willing to change opinions, behave in an appropriate manner.

**Suggested time:** about 2 hours

### **Activities: Problem-solving strategies**

Tutor to provide learners with an overview of different problem-solving strategies and ways that people can collectively share opinions and thoughts to overcome problems in the workplace.

Learners to work in small groups to identify steps they would take when solving problems and challenges. Learners could consider simple problems and how they would work to resolve them. Learners could then map their steps out in a visual process and share this with other learners.

Tutor to provide learners with an overview of the five steps to problem solving: defining the problem, identifying solutions, selecting actions, implementing actions, reviewing results. Learners should discuss which they feel is the most important step in the process and justify their choices in discussion.

Learners to be split into two groups and each given a problem. Working in separate groups, learners should use a tutor-devised worksheet to identify what they would do at each of the five steps and apply this to their given problem. Learners should then share thoughts to identify similarities and differences.

Learners could then take part in several different problem-solving activities to demonstrate their skills and to test their strategies and ideas out in practical activities and tasks. Tasks could include scavenger hunts, tower building, bridge building, escape room type activities.

**Suggested time:** about 4 hours

### **Activities: Employee and employer benefits to solving problems**

Learners to be split into two groups, one will explore employee benefits and the other employer benefits. Learners will work with others to develop a list of potential benefits of solving problems for their chosen group. Learners will then swap and add further comments to create two collective lists.

A guest speaker from a work environment could be invited to talk about the value of being able to solve problems effectively in the workplace and to share experiences of the positive and negative outcomes of problem solving in the workplace.

Learners could then work in pairs to develop a case study which identifies one workplace problem. Learners should share their case studies with other pairs and then discuss the potential benefits to employers and employees of solving problems, and the potential impacts of not solving the problem.

**Suggested time:** about 3 hours

### **Activities: Potential obstacles**

Learners discuss the potential challenges working with other people. They use their own experiences from working as a member of a team. Learners should be reminded that this is a potentially sensitive topic and should be treated with respect for others.

Learners participate in activities that help them understand the value of being resilient and assertive. Working in small groups, learners suggest words/behaviours that describe resilience and assertiveness. Suggestions should then be shared with the rest of the group. Tutors then provide different scenarios where learners need to decide if it is appropriate to be resilient, assertive or accept the situation.

Team-building games may be used to help learners understand how communication skills can create obstacles when it comes to problem solving. Activities focusing on misinformation or interpreting information in different ways may be given. Examples may include learners working in pairs and sitting opposite each other. One learner draws a simple picture but does not show it to the other person. They must describe the picture to them, and the partner draws it. When they finish, they compare drawings.

Learners should then consider situations and issues that have come about as a result of co-workers demonstrating inappropriate behaviours. Learners should work in small groups to discuss what actions they would take to deal with these issues.

As a group, learners will have a discussion to explore what is considered to be inappropriate in terms of behaviours and attitudes within work and when managing problems. For each identified behaviour or attitude, learners should explore a potential action to be used to rectify the issue.

Learners should then have a discussion about the likely impact that other people can have on their work and how human problems can be resolved positively to minimise impact and challenge. Learners should identify actions that they would take individually before sharing with others. Learners should be encouraged to discuss the impact and possible consequences of their agreed actions on other people and on the success of problem solving.

**Suggested time:** about 6 hours

### **Activities: Decision making**

Learners to share their own experiences of solving problems and the methods and steps that they take. Learners should consider the success and failures and share these in small groups.

Tutor to provide learners with an overview of the four types of decision making: analytical, directive, conceptual and behavioural. Learners to engage in discussions to explore each type with the tutor and to generate a list of examples of each that can be displayed for reference.

Learners to work in small groups to identify examples of easy, medium and challenging decisions that they have to make in their day-to-day lives, or decisions that they may make in the future. Learners to share their suggestions in group discussion.

Learners to consider and discuss what makes some decisions harder to make than others. Tutor to ask learners to think about the impacts that decision making can have on others, the wider situation, personal impacts and business impacts. Learners to revisit their list of decisions and highlight the potential impacts that decisions could have.

Learners could take part in online decision-making games to experience the potential outcomes from decisions. Learners could then discuss their thoughts and learning post activity.

Finally, learners could research decision-making processes and agree on steps to take as a small group to make decisions. Learners could then be presented with a series of work-related decisions to discuss and agree on options. Learners could then be presented with outcomes following their decisions and discuss whether or not they felt this was positive or negative for those involved.

**Suggested time:** about 4 hours

**Activities: Resolving situations and issues**

Learners discuss high-profile cases where businesses had significant problems and how they were resolved. This could include situations that were not successful, e.g. the collapse of a large retail organisation. They go on to discuss how the situation may have been resolved more effectively.

Learners complete a tutor-devised worksheet that asks a range of questions to help resolve a given situation, e.g. is it a simple or complicated problem, when do you need to resolve the problem, are there costs involved, are other people involved, does the problem need to be resolved immediately or can it wait, is it urgent or important. Situations to be based on relationship issues, operational and procedural issues. Learners could share their findings before suggesting possible solutions.

Guest speakers could be invited to discuss different ways of resolving situations and using decision making, action planning and problem-solving skills effectively.

Learners could finally revisit high-profile cases and identify all of the different problems, situations and issues that contributed. Learners could then carry out a 'what if' debate to consider the impact had one issue or problem been resolved and share their opinions.

**Suggested time:** about 3 hours

**Activities: Own skills and behaviours**

Learners to be split into two groups, one will explore behaviours needed for problem solving and the other will explore skills needed for problem solving. Learners will rotate halfway through the task to share their thoughts. Learners should then discuss their thoughts and opinions.

Learners could then complete online assessments to highlight their own skills and behaviours for problem solving and compare their outcomes to peer assessment feedback.

Learners to take part in a small group discussion on factors that may influence their behaviour when dealing with problems. Learners should rotate around flipcharts to identify physical, emotional, language and social factors that could influence behaviour. Learners could be provided with examples such as being unwell due to a late night out, feeling anxious, not understanding the instructions, cannot get on with a particular co-worker.

Learners should then explore several different problems in work to identify the necessary behaviours and skills that would be needed to resolve the issue effectively. Learners could revisit stages of problem solving to consider the different behaviours and skills needed and discuss their thoughts with others.

**Suggested time:** about 3 hours

**Activities: Strategic action planning**

Tutor to provide an overview of the use and benefits of action plans and strategic plans to support the resolving of work-related problems. The tutor should provide learners with some examples of action plans for them to review and evaluate.

Learners will be split into small groups and given a series of steps for action planning, definitions and explanations. Learners will need to work together to connect steps, definitions and explanations to display the six steps to action planning accurately. Tutor to check for accuracy.

Learners to discuss as a group the benefits and their own opinions and feelings about using action planning to target and overcome problems within the workplace. Learners could also reflect on the benefits and drawbacks of action planning for work-based problems and personal problems.

Learners should then research action planning tools and devise their own simple action plan document to be used when dealing with work-related problems. Learners could work together to identify different tools and formats and agree collectively.

Learners could finally complete a simple action plan for a given problem and seek feedback from peers.

**Suggested time:** about 3 hours

**Activity: Preparation for assessment**

The tutor reminds learners of the requirements of the assignment brief and answers any further questions that learners may have.

Group recap on key unit concepts and topics with the tutor using direct questioning to challenge learners and check understanding.

**Suggested time:** about 1 hour

**Activity: Post assessment**

Learners will take part in a group discussion to highlight the key points from the unit and how these can be used for their future progression.

Learners reflect on the notes they have produced from reference documents. They summarise what they have gained from the unit and how this will help them with their progression.

**Suggested time:** about 1 hour

## **Suggested assessment activity**

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set duration in which to complete the activity. The activity below is a suggested example. Centres are encouraged to design their own assessment activities based on the interests of the learner and the resources available locally.

### **Task**

Your task is to examine a range of work-related scenarios to explore factors which can cause work-related problems and the impact that these could cause.

You will be provided with two work-related situations to review. For each, you will need to assess the causes of the situation, potential impacts of the problems and consider who may be affected.

You will then need to create a strategic action plan to manage both situations and suggest possible solutions giving reasons for your decision. You will need to consider clear, realistic and achievable steps with appropriate identified resources, support needs and responsibility.

You will need to decide how to present your information in an appropriate format for your target audience.

### **Retake**

The learner could be provided with alternative work-related scenarios to consider and will explore different strategies for resolving problems in the workplace.

# **Unit 16: Planning for and Learning from Work Experience**

<b>Level:</b>	<b>2</b>
<b>Guided learning hours:</b>	<b>35</b>
<b>Total unit time:</b>	<b>35</b>

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## **Unit in brief**

The aim of this unit is for learners to prepare for a work placement by finding out information about the company or organisation they will be working for and set skills and personal development goals from learning gained in the work experience placement.

## **Unit introduction**

Gaining experience of the workplace will let you identify your interests and skills and help you when making decisions about future work and learning.

In this unit you will plan for your work experience placement by understanding how your interests and expectations relate to your work experience placement. You will learn the importance of gathering information about your work placement before starting. When you are in your work placement you will gain skills and knowledge that will help you understand your role and your responsibilities. You will carry out a range of tasks following health and safety guidelines and work as a member of a team. Throughout your placement you will gain feedback from others when you perform different tasks. You will use this feedback and your own learning to set goals for your personal development.

## Unit summary

Learning aim	Summary of suggested assessment evidence
<p><b>A</b> Plan and prepare for a work experience placement</p> <p><b>B</b> Evaluate own participation in a work experience placement</p>	<ul style="list-style-type: none"> <li>• A plan showing how preparations have been made for a work placement experience</li> <li>• Written or otherwise recorded personal evaluation on work experience</li> </ul>

## Key teaching and learning areas

Key teaching areas include:	
Knowledge	Skills
<ul style="list-style-type: none"> <li>• Personal preparation for work experience</li> <li>• Own expectations of work experience</li> <li>• Employer expectations</li> <li>• Expected job-related tasks</li> <li>• Identifying and resolving workplace problems</li> <li>• Sources of help and support</li> <li>• Ways to review own performance</li> <li>• Gathering feedback from others</li> <li>• Using learning to set goals</li> </ul>	<ul style="list-style-type: none"> <li>• Use information given to work appropriately in a work placement</li> <li>• Work effectively as a member of a team</li> <li>• Listening to and following instructions</li> <li>• Demonstrating positive attitudes and behaviours</li> </ul>

## Unit content

### Approach (how the learner should approach this unit)

#### Learners will need to:

- Work and communicate effectively with others as part of a team
- Work independently to undertake workplace activities and tasks appropriately and safely
- Recognise the importance of planning and research in achieving success in work experience
- Recognise the value and potential of learning opportunities from more experienced people to help plan for the future
- Be able to follow workplace procedures and policies effectively whilst demonstrating appropriate behaviours and skills

## Knowledge

### Personal preparation for work experience

- Preparing for work experience, e.g. how to get to placement, hours of work, dress, absence procedures, line manager, sources of help and advice
- Personal preparation, e.g. planning to ensure on-time arrival, transport, appropriate dress, personal hygiene
- How to research placement information, e.g. sources such as website, company leaflets; type of company or organisation; key functions such as retail, service provider, logistics; location
- Organisation structure, e.g. organisation chart, internal and external customers, learner's place in the structure

### Own expectations of work experience

- Personal work experience expectations, e.g. tasks they may be asked to complete, skills learned
- Key information about work experience, e.g. where they may be placed, tasks they may be asked to do, who they may be working with
- Importance of positive attitudes and behaviours at work, e.g. being a valued member of the team, given more responsibilities, demonstrating consistency and reliability

## **Employer expectations**

- Employer expectations and responsibilities, e.g. following workplace values, personal presentation, attitudes and behaviours, listen to and follow instructions, health and safety
- Workplace requirements, e.g. working hours, absence procedures, dress code, health and safety procedures, line manager, security procedures

## **Expected job-related tasks**

- Expected tasks in different work sectors, e.g. checking and replenishing stock, keeping display areas clean, working with colleagues and customers
- Importance of listening to and following instructions
- Importance of positive work attitude and behaviours, e.g. positive, motivated, willing to learn, listen to more experienced workers, flexible, cheerful, ask questions to clarify understanding
- How and why to take responsibility for self and own work activities

## **Identifying and resolving workplace problems**

- Workplace problems, e.g. uncertainty of instructions or expectations, communication issues, interpersonal conflict, limitations of self or others, excessive workload, safety concerns
- Resolving workplace problems, e.g. asking questions, checking if instructions are unclear or confusing, clarifying with senior staff, asking for advice or guidance, speaking to supervisors about personal issues, seeking additional training or support

## **Sources of help and support**

- How and why to follow guidance to complete tasks, e.g. ways to give guidance, who gives guidance
- Sources of help and advice when anxious or uncertain, e.g. supervisor, mentor, other colleagues, training guide, instruction manuals, work placement notes
- Recording skills and knowledge gained, e.g. notes, work diary or logbook, photographs, copies of end product, certificate of completion, answering questions, demonstrating a skill independently
- Recording tasks, e.g. employer reference, tutor observations, feedback from colleagues, work diary, logbook, photographs

## **Ways to review own performance**

- Methods of recording an evaluation
- How to use evaluation to inform future goals, plans, development
- Importance of evaluating own experience
- How to evaluate work experience, e.g. feedback from others, what did they enjoy/not enjoy, how did work experience influence their future work plans, skills and knowledge gained, what surprised them about the experience, personal learning, e.g. timekeeping, interests, talents

## **Gathering feedback from others**

- How to ask others to input into the evaluation process

## **Using learning to set goals**

- Short-term targets to achieve during work experience, e.g. personal targets such as arrive on time, attend every day; workplace targets, e.g. carry out tasks according to instructions
- Set goals to get the most out of work placement, e.g. personal targets, work-related targets, achievable and realistic goals
- Short-term goals, e.g. practice skills learned, learn a new skill, develop interests as a result of work experience, consider long-term plans such as career development
- Setting goals that develop learning, e.g. further study, other types of work placement

## **Skills**

### **Use information given to work appropriately in a work placement**

- Engage with workplace induction, e.g. tour, introductions to colleagues, review documentation and agreements, overview of health and safety
- Follow organisation policies and procedures, e.g. health and safety, code of conduct
- Take part in performance review and goal setting to gather information and identify learning objectives

### **Interpersonal skills/appropriate behaviour when working on a team task**

- Use appropriate communication to interact with other team members, share ideas and give feedback
- Use appropriate behaviours that demonstrate positivity, commitment and accountability

### **Work effectively as a member of a team**

- Work as a member of a team, e.g. respect others' experience, follow code of conduct, communicate effectively
- Engage with opportunities to learn from more experienced people within teams

### **Listening to and following instructions**

- Listen to and follow instructions, advice and guidance from more senior employees
- Use appropriate language to ask questions or seek clarification
- Use self-reflection to review instructions and information to find clarity and understanding

### **Demonstrating positive attitudes and behaviours**

- Self-manage, e.g. accepting responsibility for own tasks, being flexible, resilient, managing time to complete tasks, solving problems

## Assessment Criteria

<b>Learning aim A: Plan and prepare for a work experience placement</b>
Evidence must include: An explanation of each of the actions necessary to plan and prepare for work experience, along with evidence that shows the steps they carried out to ensure they were fully prepared prior to the placement.
<b>A.P1</b> Explain actions needed to fully prepare self for a work experience placement
<b>A.P2</b> Take responsibility for preparation for a work experience placement
<b>Guidance for assessors</b>
<b>For A.P1</b> Learners will explain the actions necessary to fully prepare for their work experience placement. They should consider how and when to communicate with the placement, logistics such as travel, timings, personal presentation, as well as ways to ensure they are fully prepared in terms of knowledge and expectations
<b>For A.P2</b> Learners will take responsibility for carrying out actions needed to prepare for their work experience placement as appropriate. This might include communicating with the placement to ask questions and find answers, planning logistical elements, undertaking relevant research
<b>Learning aim B: Evaluate own participation in a work experience placement</b>
Evidence must include: A description of the activities they carried out during their placement, and an evaluation of their placement, highlighting personal strengths and areas for development.
<b>B.P3</b> Describe activities undertaken during a work experience placement
<b>B.P4</b> Evaluate own participation in a work experience placement
<b>Guidance for assessors</b>
<b>For B.P3</b> Learners must describe the activities they carried out during their work experience placement, they may use photographs, log, diary, completion of work records or tutor/supervisor observations to support their answer
<b>For B.P4</b> Learners must evaluate their performance on a work experience placement, describing what they feel went well and what did not go so well, what were their personal strengths and areas for development and how they will use any lessons learned from their experience as they go forward. Learners may use feedback from others (e.g. supervisor) to support their evaluation

## Delivery guidance

It is recommended that practical activities are used in the delivery of this unit to help learners develop both essential knowledge and skills. The following are suggestions for activities and workshops that can engage learners and be used in preparation for the final assessment. These are not intended as a definitive guide to cover the full GLH of the unit.

### **Activities: Introduction to unit**

As an introduction to this unit, learners gather information from others who have already taken part in a work experience placement to share experiences and give advice on how to succeed.

Tutors should explain the title of the unit and the learning aims.

Learners should identify some personal aims for the unit and work experience and record these for review throughout the unit.

**Suggested time:** about 1 hour

### **Activities: Assessing own skills and interests against work sectors**

Learners discuss and then complete an analysis of their own interests, knowledge and skills and match them against their preferred work placement sectors. They include the types of roles that they hope to carry out and the knowledge and skills they aim to develop while on the placement. If appropriate, learners present their information with the wider group.

Learners could then complete online skills analysis tools and gather information from different sources, including tutors, friends and family to help identify their skills and interests. Learners could alternatively access the National Careers Service skills health check to identify potential sector recommendations.

Guest speaking employers from different sectors would be beneficial in allowing learners to ask questions and ascertain the skills and behaviours needed to work in different sectors.

Learners could finally research their chosen sectors and identify areas where they need further development. Learners could use this information to work with others in the group to develop skills, or alternatively to develop a personal action plan for improvement.

**Suggested time:** about 3 hours

**Activities: Personal expectations**

Following a class discussion on placement expectations, learners make a list of their own expectations of a work placement. They could then keep this list to refer back to when they complete their placement. Tutors provide a list of suggested topics that learners could refer to.

**Suggested time:** about 1 hour

**Activities: Work experience placement information**

The tutor discusses the importance of knowing about the structure and function of the organisation, including the 'big picture', before focusing on individual roles and responsibilities.

Learners carry out individual research about an 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 present their research to the group. This would help them appreciate the range of organisational types, structures and functions.

Learners complete a table which gives key information about a specific work placement, stating where they obtained this information. Learners give details on the type, size and purpose of the organisation, the organisational structure and its internal and external customers (if relevant).

Learners participate in a discussion on the structure and function of different organisations using case studies. Learners research and collate the information they will need about a work experience placement before they start and give reasons why this information is important. Learners present their findings to the group.

**Suggested time:** about 3 hours

**Activities: Employer expectations and responsibilities**

A guest speaker could be invited to speak about the responsibilities and expectations of the employer with regard to work experience.

In small groups, learners could thought shower different employer expectations of individuals in the workplace. Learners could relate this to their own workplace, their work experience placement or their previous experiences of working life.

Learners could then work in pairs to complete a tutor-devised worksheet covering workplace requirements. Learners could research different workplaces and complete the worksheet before sharing their findings.

Learners should then research their own sector and identify the key expectations of employers and the responsibilities and requirements of the workplace and the employer. Learners should share their findings and discuss concerns with peers during peer review.

Finally, learners could take part in an interactive quiz which asks learners to select true or false statements about employer expectations, responsibilities in the workplace and workplace requirements to assess learning.

**Suggested time:** about 3 hours

### **Activities: Preparing for work experience**

Learners work on their own or as part of a small group to create a checklist that identifies key information that they will need to know before their first day on work experience. Topics include how to get there, working hours and dress code. They then present the information to the wider group and modify their lists accordingly.

Learners complete their checklist with the information they already have and seek advice from relevant sources to fill in any missing gaps.

Tutor to explore challenges and difficulties that may arise during work experience. Learners should think about their own anxieties and worries and share these as part of a supportive discussion. Learners should think about different problems and explore ways of overcoming these, including where to seek help and advice in the work placement and who to seek advice from in their learning centre.

Working in small groups, learners could use tutor-devised case studies to identify relevant workplace policies and procedures and discuss how these could benefit them in preparing for work experience.

**Suggested time:** about 2 hours

### **Activities: Participating in work experience placement**

A speaker from different work placements may be invited to explain the process of induction and the type of information that learners will receive. Learners should be encouraged to take notes during the talk and be prepared to ask questions to clarify understanding.

Learners could watch YouTube clips of an induction then discuss the challenges of receiving lots of information at one time and techniques that they could use to help them remember. Learners could also reflect on information that they feel they need and how to access this during and following an induction.

Learners to take part in a role-play activity to explore different types of stressful, confusing or difficult situations in a work placement; this would help learners in developing skills and confidence in asking appropriate questions or asking others for help and guidance. This would help address learners' fears and concerns about handling any uncertain or difficult situations they encounter.

Learners could then create a personal reference guide for work experience to remind them of what to do in different situations and how to manage challenges effectively.

**Suggested time:** about 3 hours

**Activities: Following workplace policies and procedures**

Tutors provide learners with examples of different types of policies and procedures that they are likely to encounter during their work experience, e.g. health and safety, use of mobile phones and internet, smoking, code of conduct.

In small groups, learners could select one of the policies/procedures and research these in more detail to develop a short presentation to deliver to others in the group.

Learners could contact their work placement and ask for copies of policies and procedures to share in group discussions and activities.

Learners could work in pairs to find information on health and safety and other aspects of work that apply to them. Information on health and safety can be found on the Health and Safety Executive website – [www.hse.gov.uk](http://www.hse.gov.uk).

Video clips from the web or YouTube on health and safety issues could be shown to stimulate discussion of the consequences of non-compliance. Learners could reflect on these to identify potential health and safety issues within their own chosen work experience placement and share ideas on how to minimise problems and issues.

Learners create a simple health and safety at work risk assessment, then carry out a risk assessment of the classroom. This could then be followed with discussion on the rights and responsibilities of both employers and employees.

**Suggested time:** about 3 hours

**Activities: Learning from and recording experiences**

Learners discuss different ways to record their experiences in the work placement, e.g. photographs, notes, diagrams, audio recordings. They go on to discuss the value of keeping records and what they can learn from them.

Learners decide what information will be useful to record to help them set goals for personal development. This should include a brief description of the task, what they could do beforehand, what did they learn about the task itself, what did they learn about working with other people.

Tutors could share previous work experience logbooks and evidence generated by other learners as a way of encouraging learners to identify the most effective methods.

Learners should consider the importance of confidentiality when recording information in the workplace.

**Suggested time:** about 2 hours

**Activities: Reflecting on skills development and personal development**

Learners take part in a range of different generic workplace tasks, e.g. listening to and following instructions, taking part in team activities, solving problems. Learners could then offer peer-to-peer feedback to outline the strengths and areas for improvement.

Learners could review their self-assessments and skills checks to identify key areas for improvement. Learners could then create checklists for their own reference that highlight ways in which skills could be developed and suggested tasks that would help improvement, e.g. improving communication skills by talking to new people, interacting with customers, making telephone calls.

Finally, learners could create a simple personal reflection form that they could review during work experience to identify skills development. The form could include a range of questions that the learner responds to or include checklists and tick sheets. Learners could share these with peers and seek feedback before producing the final copy.

**Suggested time:** about 2 hours

**Activities: Using feedback from others**

Tutor to provide learners with an overview of the importance of gathering feedback and responding to feedback from others. Learners should identify different benefits of gathering and responding to feedback and share these with the group.

Learners could then work in pairs to identify different types of feedback they may receive from other people. Suggestions may include supervisor discussions, recommendations from colleagues, aural or written evidence.

YouTube videos could be used to show people receiving feedback. Learners should reflect on the videos and discuss positive and negative ways of giving and responding to feedback based on the clips shown.

Tutor to explore ways in which learners could deal with negative or challenging feedback. Learners to discuss their own experiences of dealing with negative feedback and use these to identify ways that they could manage this within the workplace.

Learners could each select a scenario which links to feedback in the workplace. These scenarios could include positive feedback from a customer, formal feedback from an employer or negative feedback following a mistake. Learners should then reflect on the scenario and discuss ways that they could use and respond to the feedback given in a positive way.

**Suggested time:** about 3 hours

**Activities: Setting goals for skills and personal development**

Learners to identify the five key aspects of SMART objectives and discuss the meaning of each of these: specific, measurable, achievable, realistic and timebound.

Learners could then work together to create a series of SMART objectives for personal development and work experience. Learners could think about their own areas of development or create generic objectives that could be personalised.

Using tutor-devised personal development plans, learners set SMART objectives for their work experience placement and review these with peers. Learners could then share their objectives with the group and justify their choices.

Learners review their objectives once they have completed their work placement and reflect on whether they achieved them. Learners develop checklists that allow them to say when they demonstrated their skills during their work placement. Checklists could also be used to describe those aspects of the work placement experience that could be improved.

**Suggested time:** about 2 hours

**Activity: Preparation for assessment**

The tutor reminds learners of the requirements of the assignment brief and answers any further questions that learners may have.

Group recap on key unit concepts and topics with the tutor using direct questioning to challenge learners and check understanding.

**Suggested time:** about 1 hour

**Activity: Post assessment**

Learners will take part in a group discussion to highlight the key points from the unit and how these can be used for their future progression.

Learners reflect on the notes they have produced from reference documents. They summarise what they have gained from the unit and how this will help them with their progression.

**Suggested time:** about 1 hour

## **Suggested assessment activity**

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set duration in which to complete the activity. The activity below is a suggested example. Centres are encouraged to design their own assessment activities based on the interests of the learner and the resources available locally.

### **Task**

Your task is to present information about your workplace experience and set goals based on your learning and feedback from others.

You will need to research your work experience placement to gather information in order to set yourself detailed actions to prepare for your placement.

You will then need to record the tasks and/or activities that you have been asked to complete while undertaking your work experience in order to complete a logbook describing your experience.

You will then review and evaluate the successes of your work experience placement, setting goals for future skills and personal development while making clear reference to what you have learned from your experience.

You will also need to decide how to present your information in an appropriate format for your target audience.

### **Retake**

The learners could demonstrate preparation and participation in a work placement using different examples and reflecting on different aspects of preparation to set new goals for skills and personal development.

# **Unit 17: Encouraging Environmental Awareness in the Workplace**

<b>Level:</b>	<b>2</b>
<b>Guided learning hours:</b>	<b>35</b>
<b>Total unit time:</b>	<b>35</b>

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## **Unit in brief**

The aim of this unit is for learners to deepen their understanding of sustainability in the workplace and how to raise awareness in others of the importance of working in environmentally friendly ways.

## **Unit introduction**

As individuals, we are responsible for helping to protect our environment. In recent years, the concept of sustainability has become more popular as individuals, in our homes and at work.

In this unit you will discover the range of different areas of sustainability that can counter the environmental challenges affecting the planet today. You will look at sustainability in the workplace and how people at work can become more environmentally friendly.

In small groups, you will decide on a project to raise awareness of sustainability in the workplace, planning, delivering and evaluating its impact in a specific workplace.

## Unit summary

Learning aim	Summary of suggested assessment evidence
<p><b>A</b> Investigate factors surrounding environmental awareness in the workplace</p> <p><b>B</b> Encourage others to be environmentally aware in the workplace</p>	<ul style="list-style-type: none"> <li>• Research into factors around the environment presented in an appropriate format</li> <li>• Presentation of a strategy to raise awareness in an appropriate format fit for purpose and audience</li> </ul>

## Key teaching and learning areas

Key teaching areas include:	
Knowledge	Skills
<ul style="list-style-type: none"> <li>• The environment</li> <li>• Importance of our environment</li> <li>• Environmental challenges</li> <li>• Initiatives to improve sustainability</li> <li>• Improving own sustainability</li> <li>• Sustainability at work</li> <li>• Local, national and global organisations</li> <li>• Raising awareness in the workplace</li> <li>• How to lead a project to improve environmentally friendly practices</li> <li>• Why and how to evaluate impact</li> </ul>	<ul style="list-style-type: none"> <li>• Self-improvement</li> <li>• Communication skills</li> <li>• Supporting others to become more environmentally friendly in the workplace</li> <li>• Leading by example</li> </ul>

## **Unit content**

### **Approach (how the learner should approach this unit)**

#### **Learners will need to:**

- Recognise and respect other peoples' opinions and skills when working as a group
- Share information with others in appropriate ways
- Work with given resources in identifying, managing and presenting sources of information
- Consider ways in which they can change their lives to be more sustainable
- Be an ambassador for change
- Use persuasive skills to encourage others to adapt their approach and ways of working
- Reflect on the impact of a project

#### **Knowledge**

##### **Environmental sustainability**

- The meaning of environment, e.g. air, water, soil, plant life, animals, wildlife
- The importance of respecting and preserving our environment, including the impacts of environmental issues, e.g. pollution, loss of biodiversity, lack of water supply, health problems, releases of greenhouse gases
- Global partners in environmental sustainability, e.g. SOAS, the United Nations, the World Health Organization, National Geographic, Unilever, Adidas, BT, Pearson, Tesla

##### **Environmental challenges**

- Global, national and local environmental challenges, such as climate change, flooding, water scarcity, pollution, deforestation, global warming, food production, including meat
- Local, national and global organisations committed to sustainability and preserving the environment

## **Initiatives to improve sustainability**

- Global sustainability initiatives, agreements and protocols
- International regulations to target air quality, water quality, soil quality, plant life, animals and wildlife, hazardous waste, greenhouse gases
- Initiatives to improve sustainability, such as the 4Rs: Reduce, Reuse, Recycle, Recover
- The 8 doorways to sustainability: food and drink, energy and water, travel and traffic, purchasing and waste, nature and biodiversity, buildings and grounds, inclusion and participation, local well-being
- Awareness of other sustainability campaigns and how they get across their message, e.g. slogans, imagery

## **Improving own sustainability**

- Personal contributions to help sustain environmental issues, e.g. switching off lights, recycling, saving water, not littering, using sustainable transport – cycling, public transport

## **Sustainability at work**

- Initiatives to improve sustainability at work, e.g. reducing waste, accessing green energy, moving to paper-free offices, reducing carbon footprint, setting reduction targets, moving to plastic-free operations, sustainable procurement
- Sustainable development goals, e.g. clean water and sanitation, affordable and clean energy, responsible consumption and production, climate action
- Reasons why workplaces may or may not support environmentally friendly working practices

## **Raising awareness in the workplace**

- Raising awareness of sustainability including speakers, campaigns and information
- Strategies that might persuade workplaces to adopt more environmentally friendly working practices

## **How to lead a project to improve environmentally friendly practices**

- Project action planning, e.g. process, recording methods
- How to decide on the focus of a project

## **Why and how to evaluate impact**

- Methods of measuring impact, e.g. opinion, attitude, data
- How and why to evaluate the impact and outcomes of the project

## **Skills**

### **Self-improvement**

- Planning for self-improvement, e.g. identifying realistic goals, timescales, overcoming potential barriers, other restrictions

### **Communication skills**

- Developing communication skills, e.g. explaining own point of view, listening, asking and answering questions, presenting information

### **Supporting others to become more environmentally friendly in the workplace**

- Contribute to environmentally friendly working practices
- Research to explore ways in which workplaces are environmentally friendly

### **Leading by example**

- Persuade others of the need to be more environmentally friendly in the workplace

## Assessment Criteria

### **Learning aim A: Investigate factors surrounding environmental awareness in the workplace**

Evidence must include:

An examination of environmental issues which are a concern at global, national and/or local level and research into the ways workplaces strive to be environmentally friendly.

**A.P1** Examine current environmental concerns

**A.P2** Research ways in which workplaces fulfil their commitments to be environmentally friendly

### **Guidance for assessors**

**For A.P1** Learners must examine environmental issues which are currently of concern at a global, national and/or local level, reporting on each one, including its causes and impact. These might include pollution, single-use plastics, global warming, deforestation, littering, energy use

**For A.P2** Learners must research the ways in which workplaces strive to be environmentally friendly. These may be local workplaces that the learner can speak directly with and/or be based on internet searching or other types of research. Learners will report on the action and/or strategies that each workplace uses to fulfil their commitment to working in an environmentally friendly way

### **Learning aim B: Encourage others to be environmentally aware in the workplace**

Evidence must include:

An evaluation of different ways in which workplaces could be more environmentally friendly and evidence of their practical contribution to planning, delivering and evaluating a project or strategy that encourages others to be more environmentally friendly in a real workplace.

**B.P3** Evaluate strategies that could be used to support workplaces to become more environmentally friendly

**B.P4** Lead an environmentally friendly strategy in the workplace

### Guidance for assessors

**For B.P3** Learners will select different ways in which workplaces could be more environmentally friendly and evaluate each, exploring the positives of undertaking identified action (e.g. it will save water, energy), as well as any potential negatives for the employers and/or employees (e.g. cost, hassle). Learners may consider different workplaces, environments and/or sectors in their answer

**For B.P4** Learners must devise and lead action to encourage others to be more environmentally friendly in a workplace. They will decide on an appropriate element to tackle, create an action plan, carry out their plan with the identified organisation and evaluate their success afterwards (in the short term and, where possible, in the longer term)

## Delivery guidance

It is recommended that practical activities are used in the delivery of this unit to help learners develop both essential knowledge and skills. The following are suggestions for activities and workshops that can engage learners and be used in preparation for the final assessment. These are not intended as a definitive guide to cover the full GLH of the unit.

### **Activities: Introduction to the unit**

Tutor-led activity to introduce the requirements of the unit, including purpose, ways of working, expected personal learning outcomes and assessment methods.

Tutor-led activity exploring some of the vocabulary and terminology of the unit. Tutors can prepare cards with the terminology on them and ask learners to match the definition, or tutors ask learners to research the terms and feed back their own definitions.

For example, 'being greener', sustainable, renewable/non-renewable resources, fossil fuels, global, local, Fairtrade, landfill, climate, developing, environment, carbon footprint, ethical, production, ecological, consumers.

**Suggested time:** about 1 hour

### **Activity: The environment**

Tutor-led introduction exploring the meaning of the environment and its importance globally, nationally and locally. Where possible, the tutor should form links to local environmental initiatives, news or issues.

YouTube clips could introduce the topic of the environment and the issues affecting it. This may be recent news bulletins, short clips from nature programmes or information videos from environmental groups. Alternatively, learners could be asked to review nature documentaries as a preparatory activity before the session.

In small groups, learners to create a mind map of problems that they know are affecting the environment. Learners should then work together to identify which of the environmental issues are local, national and international. Learners should feed back to the wider group.

Tutors ask learners, in small groups, to choose an area to research. Suggested areas can be climate change, flooding, pollution, forest clearing, deforestation, global warming, plastic pollution, wildlife populations, water shortages and overpopulation. Learners to research their chosen area and present their findings to the group.

Working in small groups, learners research ways that people and local, national and global organisations are trying to protect the environment from further damage. Learners should be encouraged to search for news articles, media posts and alternative sources of evidence. In small groups, learners should identify actions that are being taken and create a class list for display.

**Suggested time:** about 3 hours

**Activities: What do we mean by sustainability?**

Tutor asks learners if they have heard of the term 'sustainability'. Learners to create a word-wall with terms and words that link to the key word. Learners could use Post-it notes to display their added words, or alternatively online platforms could be used to collect responses.

Tutor gives a definition of sustainability. For example, "Sustainability is meeting the needs of the present without compromising the ability of future generations to meet their own needs" (The Brundtland Report 1987). The tutor can also ask learners to research other definitions of sustainability and ask the group to choose their favourite or to write their own.

Learners could then explore the meaning of environmental sustainability and in small groups create digital documents to show what the environment means to them and what aspects of the globe are targeted in environmental sustainability.

Finally, learners could each research one organisation that has committed to operating sustainably and meeting environmental sustainability goals. Learners could then create a one-page profile for each organisation showing its commitments and actions to display in the classroom. The tutor could give examples such as BT, Adidas, Samsung, Tesla and HP.

**Suggested time:** about 2 hours

**Activities: Why is sustainability important?**

Learners to be provided with a variety of topics, such as household waste, water consumption, waste food, food production, single-use plastics. Learners to then be asked to individually guess the number associated with the topic. Learners to discuss their thoughts and opinions following the activity.

Tutor shows videos about the impact of global warming on the environment. In small groups, learners research the impact of global warming – melting ice, rising sea levels, local flooding, climate change, loss of biodiversity, loss of agriculture, famine. Learners should present their findings to each other and share their opinions and thoughts.

In small groups, learners investigate the different ideas that support the idea of sustainability. Tutor suggests ideas if needed, e.g. energy reduction, sustainable transport, alternative energy sources (wave, wind, solar), recycling, renewable resources. Learners could create classroom displays or alternative informative documents to use within their learning environment.

In small groups, learners to create a digital survey to gather feedback from others about their view of sustainability and its importance. Learners to consider their findings and their own viewpoints to discuss outcomes and identify surprises in public opinion.

Ask learners to think about a typical day, week, month in their lives. They can present this as a visual timeline or checklist. How do they depend on the environment? This could include the air to breathe, water to drink, food production, housing (affordable homes, natural, renewable, and affordable building materials), clothing and transport.

Learners to finally work in small groups to discuss 'why does sustainability matter to me?'. Learners should collectively agree on feedback points to share with the group. Learners could then create a classroom display using the question as a starting point.

**Suggested time:** about 5 hours

### **Activities: Sustainability in the workplace**

Learners to carry out research into different organisations and workplaces to identify how they are meeting sustainability commitments and what actions they are taking. Learners to share their findings. Alternatively, learners could interview local businesses.

The tutor introduces the concept of the 4Rs (or 6Rs): (Rethink, Refuse), Reduce, Reuse, Recycle, Recover. They are all useful terms to explore reducing impact on the environment.

Learners to work in small groups to create a short presentation to inform others about each of the 4Rs (or 6Rs). Learners should provide useful examples of ways that people can meet each of the Rs easily at home or in work.

Learners to take part in a group activity 'The 8 doorways'. Learners will rotate around eight flipcharts to share their ideas of the issues and actions that can be taken to target each of the 8 doorways: food and drink, energy and water, travel and traffic, purchasing and waste, nature and biodiversity, buildings and grounds, inclusion and participation, local well-being.

Learners could then break off into smaller groups and research one particular doorway in more detail and create a classroom information display considering how the doorway relates and applied to the learning centre or workplace.

Learners could then explore their own learning centre or workplace and identify the ways in which the workplace is promoting and encouraging sustainability and environmentally friendly behaviours through recycling points, reduced single-use plastic, paper-free principles, etc.

Where possible, learners would also benefit from accessing other workplaces to identify steps taken towards sustainability or engage with guest speakers.

Learners should finally collate all of their findings and learning to work in small groups to create a 'How To' guide for sustainability in the workplace.

**Suggested time:** about 6 hours

### **Activities: Looking at our own sustainability**

Learners to be provided with cards that have different activities which should be linked to the 8 doorways of sustainability, e.g. flying on a plane for holiday, using refillable water bottles, driving to work, recycling plastics, growing own vegetables, shopping locally, leaving the TV on standby, using electricity from coal power stations, using bags for life, using electricity from wind farms. Learners should then order their cards depending on how sustainable the activity is.

In pairs, or small groups, learners list the ways in which their lives are, and are not, sustainable. Ask them to think about: what they eat, how they travel, where they shop, electronics they use, their energy use, where their clothes come from, their recycling habits, littering.

Learners to create and record their household habits and actions linked to sustainability, e.g. how much do they waste? How much recycling do they do? How often do they use single-use plastic? Learners should share their findings and rate themselves as a group from most sustainable to least sustainable.

Tutor-prepared activity. Use case studies of young people from a range of different countries, some from the so-called developing worlds and others from the so-called developed world. Ask the learners to consider how the lives of these young people may be more, or less, sustainable than their own. Use the list from the exercise above to look at travel, shopping, energy use, etc.

**Suggested time:** about 3 hours

### **Activities: Guest speakers and visits**

The use of a guest speaker from local environmental organisations would position the relevance of sustainability, help identify the issues that are of concern and establish the reasons why we need sustainability in our lives today. Learners should prepare questions about sustainability.

Some local authorities have Waste Education Teams, or similar, who are willing to visit centres to give presentations regarding sustainability issues and may provide other resources.

Visits: teacher-led activities to explore a range of different local sustainability learning opportunities. This includes a recycling centre, a local park, local woodland area, local gardens. These can be short visits to explore how these environments promote sustainability. Learners record the visits to use for discussion and thinking about their assessments.

**Suggested time:** about 3 hours

**Activities: Project to develop sustainability in the workplace**

Learners need to develop a project looking at how people in the workplace can improve sustainability in their workplace or learning centre. The project should focus on one of the eight sustainability gateways, e.g. food and drink, energy and water, travel and traffic, purchasing and waste, buildings and grounds, inclusion and participation, local wellbeing, global dimension.

Before beginning the project, the tutor can direct learners to look at sustainability campaigns to see if there is anything they can learn, including how they present their findings and how they try to persuade people to change their habits.

Learners should decide on the groups they are working in or this can be decided by the tutor.

Learners should decide where they are going to focus their project on. They should develop a project plan, with aims, objectives that meet the project specifications and agreed activities to given timelines. They should identify risks, any health and safety considerations or PPE needed.

They should decide who will be responsible for different parts of the project. For example, research, collating information, designing the project findings. Learners should decide what aspects of sustainability they want to improve in the chosen workplace. Learners should decide in which format they will present their project. Learners decide on how they are going to best promote their findings to others.

After the project, learners should evaluate how their own performance, how well the project went and how it could have been improved. Tutors provide a checklist to guide this reflection.

**Suggested time:** about 5 hours

**Activity: Preparation for assessment**

The tutor reminds learners of the requirements of the assignment brief and answers any further questions that learners may have.

Group recap on key unit concepts and topics with the tutor using direct questioning to challenge learners and check understanding.

**Suggested time:** about 1 hour

**Activity: Post assessment**

Learners will take part in a group discussion to highlight the key points from the unit and how these can be used for their future progression.

Learners reflect on the notes they have produced from reference documents. They summarise what they have gained from the unit and how this will help them with their progression.

**Suggested time:** about 1 hour

## **Suggested assessment activity**

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set duration in which to complete the activity. The activity below is a suggested example. Centres are encouraged to design their own assessment activities based on the interests of the learner and the resources available locally.

### **Task**

Your task is to conduct research into environmental awareness in the workplace to encourage others to be more environmentally friendly.

You will need to research current environmental concerns and explore ways in which workplaces commit to being environmentally friendly and meet their commitments using examples.

You will then need to consider the performance of other workplaces and review strategies used to encourage environmental awareness within the workplace, selecting appropriate methods design and lead an environmentally friendly strategy.

You will finally need to review your plan and strategy to highlight areas of success.

You will need to decide how to present your information in an appropriate format for your target audience.

### **Retake**

The learner could research different environmental concerns and develop an alternative strategy for workplace awareness.

# Unit 18: Being Entrepreneurial

<b>Level:</b>	<b>2</b>
<b>Guided learning hours:</b>	<b>35</b>
<b>Total unit time:</b>	<b>35</b>

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## Unit in brief

This unit introduces learners to what it means to be an entrepreneur.

## Unit introduction

An entrepreneur is an individual who creates a new, for-profit business, bearing most of the risks and enjoying most of the rewards. Entrepreneurs play a key role in any economy, using their skills and initiative to anticipate needs and bringing good new ideas to market. Being an entrepreneur can be on a small, local scale.

Enterprise activities are planned and run by individuals keen to develop, promote and deliver a chosen product or service to a particular group of people or customers. Planning an entrepreneurial activity is essential to its success as it encourages individuals to consider the best way to achieve a positive outcome or profit and to make the activity successful.

In this unit you will be given the opportunity to find out what is involved in becoming an entrepreneur. You will consider what is needed to conduct a successful enterprise activity and carry it out. You will keep accurate records, recording the profit or loss of the enterprise activity. You will also develop an understanding of how to increase the chances of success of an enterprise activity and how to evaluate its performance.

## Unit summary

Learning aim	Summary of suggested assessment evidence
<p><b>A</b> Understand entrepreneurial skills, behaviours and strategies</p> <p><b>B</b> Meet customer needs and expectations</p>	<ul style="list-style-type: none"> <li>• Research and findings presented in an appropriate format</li> <li>• Written or otherwise recorded evaluation of the skills and behaviours used during the planning and delivery of the enterprise activity</li> <li>• An observation record of performance</li> </ul>

## Key teaching and learning areas

Key teaching areas include:	
Knowledge	Skills
<ul style="list-style-type: none"> <li>• Understanding 'enterprise' and people who have succeeded in that arena</li> <li>• Key skills and behaviours needed for enterprise activities</li> <li>• How and why identified skills and behaviours support successful enterprise</li> <li>• Entrepreneurial strategies</li> <li>• Roles and associated responsibilities when planning and undertaking an enterprise activity</li> <li>• Teamworking skills needed for successful enterprise activities</li> <li>• Ways to manage finances and record profit and loss when running an enterprise activity</li> <li>• How to advertise an enterprise activity</li> <li>• Strategies to involve others in the enterprise activity</li> <li>• How to evaluate the enterprise activity</li> <li>• How to plan to develop weaker areas</li> </ul>	<ul style="list-style-type: none"> <li>• Research to find successful entrepreneurs and their stories</li> <li>• Decide on an enterprise activity to undertake</li> <li>• Plan an enterprise activity</li> <li>• Fulfil a role and associated responsibilities when planning and undertaking an enterprise activity</li> <li>• Use appropriate entrepreneurial strategies</li> <li>• Work as part of a team</li> <li>• Manage finances and record profit and loss when running an enterprise activity</li> <li>• Advertise an enterprise activity</li> </ul>

## **Unit content**

### **Approach (how the learner should approach this unit)**

#### **Learners will need to:**

- Work and communicate effectively with others to complete an enterprise task
- Work independently and take responsibility for own actions and set tasks
- Recognise the importance of maintaining a positive vision when faced with barriers and failures to success
- Be able to demonstrate confidence in sharing own ideas and opinions and in making mistakes and admitting defeat
- Recognise the importance of reflecting on own achievements in an enterprise activity

#### **Knowledge**

##### **Understanding 'enterprise' and people who have succeeded in that arena**

- What is meant by 'enterprise' and being an 'entrepreneur'
- Famous entrepreneurs and the journey they have taken to achieve success

##### **Key skills and behaviours needed for enterprise activities**

- Key skills needed for enterprise activities, e.g. communication, organisation, motivation, interpersonal skills, negotiating, teamworking skills, cooperation, compromise, active listening
- Key behaviours needed for enterprise activities, e.g. vision, drive, determination, risk tolerance, honesty, mutual respect, positivity, optimism, adaptability, flexibility, networking, taking responsibility
- How and why identified skills and behaviours support successful enterprise

##### **Entrepreneurial techniques**

- Research, e.g. knowing your competition researching products and markets, gathering feedback, analysing information and data
- Networking, e.g. making contacts, building relationships, linking with other entrepreneurs, connecting with suppliers or stockists
- Taking risk, e.g. being innovative and creative, trying new things, sampling and trialling products or services, making bold decisions
- Responding to change, e.g. learning from trends, recognising adaptations, noticing competition, understanding customer demand

## **Roles and associated responsibilities when planning and undertaking an enterprise activity**

### **Planning and delivery an enterprise activity**

- Steps required to plan an enterprise activity
- Roles and associated responsibilities to manage the planning and delivery of an enterprise activity
- Ways to manage finances and record profit and loss when running an enterprise activity
- How to advertise an enterprise activity
- Strategies to involve others (users, customers, other stakeholders) in the enterprise activity

### **How to evaluate the enterprise activity**

- How to evaluate the enterprise activity, e.g. self-review, peer review, participant feedback, data and statistics
- Why evaluation is important, e.g. to highlight success and failure, for future learning and development
- How to plan for the development of weaker areas

## **Skills**

### **Research**

- Researching successful entrepreneurs and their stories
- Researching potential enterprise activities, risks and benefits
- Gathering information to help plan and deliver an enterprise activity

### **Interpersonal skills/appropriate behaviour when working with others**

- Use appropriate communication to interact with other individuals, share ideas and give support
- Communication skills explaining own point of view, listening, asking and answering questions, presenting information
- Use appropriate behaviours that demonstrate cooperation, understanding, compromise, dedication, commitment and honesty

### **Decision making and problem solving**

- Decide appropriate action/s in light of research, information and queries
- Problem solving, e.g. assessing a work area, identifying relevant information and suggesting ways to mitigate the problem
- Acting in the best interests of the team and the project

## **Enterprise skills**

- Use innovation and creativity to generate ideas, suggestions and concepts
- Prioritise and plan for tasks and activities to aid in the delivery of a successful enterprise activity
- Use appropriate methods of financial recording and calculation

## Assessment Criteria

<p><b>Learning aim A: Understand entrepreneurial skills, behaviours and strategies</b></p> <p>Evidence must include:</p> <p>Analysis of the achievements, and journey they have taken to reach success, of different entrepreneurs, along with a description of the skills, behaviours and strategies that the learner feels are necessary in order to be a successful entrepreneur.</p>
<p><b>A.P1</b> Analyse the achievements of entrepreneurs, including their journey to success</p>
<p><b>A.P2</b> Explain the skills, behaviours and strategies that are necessary for entrepreneurial success</p>
<p><b>Guidance for assessors</b></p>
<p><b>For A.P1</b> Learners must select different entrepreneurs and, for each one, analyse their achievements in business and the journey they have taken to achieve success, including any failures, disappointments and barriers they have faced and overcome along the way</p>
<p><b>For A.P2</b> Learners must explain the skills, behaviours and strategies that they feel are important for success as an entrepreneur, using their identified entrepreneurs to help illustrate their answer</p>
<p><b>Learning aim B: Plan, deliver and evaluate an enterprise activity</b></p> <p>Evidence must include:</p> <p>Demonstration of the learner's management of the planning and delivery of an enterprise activity, and an evaluation of their own contribution, in particular the skills, behaviours and strategies used and how these positively impacted the activity.</p>
<p><b>B.P3</b> Manage the planning and delivery of an enterprise activity</p>
<p><b>B.P4</b> Evaluate the impact of own skills, behaviours and strategies on the success of an enterprise activity</p>

### Guidance for assessors

**For B.P3** Learners must work as part of a group to manage the planning and delivery of an enterprise activity. This should be an enterprise activity devised by the learners. The learner must take an active role in the management of planning and delivery of an enterprise activity. Learners should consider the skills, behaviours and strategies that will positively impact their involvement in the activity

**For B.P4** Learners must evaluate their own contribution to the enterprise activity, focusing on the previously identified skills, behaviours and strategies necessary for successful entrepreneurship and the way/s in which these may have benefitted the group, the process and the outcome of the activity. Learners should highlight their own strengths and areas for development and suggest ways in which weaker areas could be improved

## Delivery guidance

### **Activities: Introduction to unit**

The tutor explains the title and aim of the unit and provides the learners with a brief but general overview of the unit.

Tutors prepare an activity that asks learners to match words or phrases relevant to enterprise to the correct definitions. This should include words such as enterprise, self-employed, entrepreneur, start-up, economy, profit.

The tutor then checks for accuracy and explains what each of the words or phrases mean and how they are relevant to the unit.

In small groups, learners to create a word-wall of words that they relate to enterprise, which can include examples of entrepreneurs, businesses, television programmes and definitions.

Tutor to provide learners with names of famous and successful entrepreneurs. Learners will research who they are, what enterprise they have launched and why they are famous/successful. Learners will create short presentations to feed back to **the group about their selected entrepreneur.**

**Suggested time:** about 2 hours

### **Activities: Self-management and presentation skills for entrepreneurs**

Learners to discuss in small groups and create a list of reasons why it is important to have good self-management skills when running an enterprise activity or being self-employed. Tutors can discuss with learners what is meant by self-management skills and why they are important.

Learners discuss the importance of 'attitudes and values' in the workplace. In small groups, learners could discuss what is meant by this. For example, honesty, integrity, professionalism, fulfilling contractual duties, respecting confidentiality, not bullying, compliance with company policies, good timekeeping; helping; being attentive; displaying appropriate body language; using appropriate language; good manners; knowledge of products and services.

Tutor-led discussion, come up with a checklist of how to behave when representing yourself and your business. In small groups, to come up with a list of positive and negative behaviours. What would be inappropriate behaviours for someone who is asking customers to give them money for a service?

Learners to choose several of the behaviours from the discussion and research why these behaviours are important. Learners should be encouraged to explore videos online and news articles or fact sheets linked to entrepreneurial behaviours.

Learners discuss the importance of personal presentation when working for yourself or in a workplace. For example, appropriate clothing for the role, good personal hygiene, importance of adhering to organisational requirements.

Learners could be shown a series of images of successful entrepreneurs to identify different aspects of personal presentation. Learners to reflect on the appropriateness of personal presentation and discuss the impression that this gives to others.

The tutor could provide learners with news stories about when entrepreneurs behave badly, e.g. Alan Sugar swearing at cyclist, Richard Branson using inappropriate gestures towards photographers. Learners could review the story and discuss the impact that this has on the business, the entrepreneur and on customers.

Learners could then collate their understanding and agree levels of personal self-management and presentation that they would expect of themselves within enterprise.

**Suggested time:** 3 hours

### **Activities: What makes an entrepreneur**

Learners to work as a group to list key points that they feel 'make' an entrepreneur and defines them from others. Learners should reflect on their points and justify their thoughts and opinions with examples.

Guest speakers would be beneficial in allowing learners to ask direct questions as to what they feel makes them unique and what skills/behaviours that they have which have made them an entrepreneur.

Learners to then work in pairs to select an entrepreneur from a given list and research them to create a pen-profile of the individual. Learners should then consider what makes the individual unique and defines them from others.

Tutor to ask learners to consider the statement 'entrepreneurs are all about the business rather than about what they can do'.

Learners could then create a list of the skills, behaviours and attitudes that their selected entrepreneur has and share these with others to identify common themes and common attributes.

Learners should finally reflect on all the entrepreneurs explored and discuss what makes them successful, and what makes them an entrepreneur. The tutor could add a pen-profile of a learner from the group to the line-up of entrepreneurs to ask if they 'fit' in the mix and why.

**Suggested time:** 3 hours

### **Activities: Matching skills and interests**

Learners to take part in a group discussion to identify the difference between skills and behaviours. Learners could begin by working in pairs and then sharing their answers with the larger group. Learners could then collate the information on a chart to refer to during the delivery of the unit.

In small group discussions, learners match what skills and behaviours in personal life are transferable to enterprise and self-employment: good listening would be useful for researching customer needs and wants, motivational skills would help motivate and encourage staff or encourage customers to buy, positive behaviours would be helpful during challenges.

Learners could then work in two different groups to identify skills or behaviours needed for enterprise. Learners should reflect on prior learning and analysis of entrepreneurs to help them. Learners should swap halfway through to consider the alternative requirement (skills or behaviours). Learners should then discuss their findings.

Using a tutor-devised template, learners could then reflect on the skills and behaviours required and rate themselves to identify how entrepreneurial they are as individuals. Learners could then rank themselves as a group.

Learners discuss, in small groups, their interests and what they enjoy doing. They could make a list of those interests and put them into order of priority, e.g. what they enjoy doing most and what they are not so keen on. Learners should share their ideas with others.

Using a selection of the interests in the group, the tutor could display flipchart pages with each interest around the classroom. Learners could then rotate around the flipcharts to identify how these interests could be used in entrepreneurial activities, as potential business ideas, or how they could help them develop skills and behaviours for enterprise.

**Suggested time:** 3 hours

### **Activities: Factors to consider for success of enterprise activities**

Tutors stimulate group discussion as to what is required for an enterprise activity or small business to be successful. Through the discussion, ideas should also be generated regarding different types of products and services and how they could be provided.

'Successful' in this context means that the learner understands how to carry out their activity and reach their planned sales targets. Learners may find it helpful to watch video clips from programmes such as *Dragon's Den*, or similar, which may provide additional information to support this knowledge. Additionally, learners could read news articles relating to successful local or national enterprise activities.

Group discussions are also a useful way of helping learners understand the importance of consumer needs in influencing the success of an enterprise activity.

Learners could also seek advice or opinions from visiting guest speakers or other businesspeople about consumer demand and how the enterprise activity might meet consumers' needs.

Learners should consider, in small groups, the risks associated with working for themselves. This should include different types of risks, e.g. lack of skills, competition from others, price of production, raising finance for start-up costs, weather.

Learners should be encouraged to consider factors that might lessen risks, e.g. start-up costs are minimal, payment will be received immediately at point of sale, no additional staff required to provide the service, family members on hand to provide back-up help and support.

Speakers who have experience of setting up and running a successful small, or large scale, enterprise could be invited in to speak to learners.

**Suggested time:** about 3 hours

### **Activities: Researching enterprise activities**

Learners to work in small groups to identify a range of different enterprise activities based on their preferences, interests, hobbies and experiences. Learners should then review the ideas and decide which ones are useful to carry forward.

Learners could then research similar products or services in the market and identify different competitors. Learners could create mind maps of their potential competitors and explain how they will make adaptations to their product or service to compete effectively.

Tutors will introduce market research to establish customer demand or need, which include competitors, potential customers, focus groups, relevant sources of information and surveys. Learners could then work in groups to create market research surveys to establish the needs, wants and requirements of potential customers to help develop their product or service. Learners could then review their findings and discuss next steps.

Learners could then create prototype models or images of their products following their research and present these to others in the group to gather more feedback before finalising their ideas and plans.

Using their research, learners could complete a SWOT analysis to identify influencing factors that they have recognised through research. For example, learners could consider the impact of competitors as threats to the enterprise activity, or uniqueness of the product as a strength and opportunity.

Learners should consider and discuss different benefits to carrying out research and how this could help them when selecting, planning and running an enterprise.

**Suggested time:** about 3 hours

### **Activities: Planning an enterprise activity**

Learners devise a checklist for the process or steps needed in an enterprise activity from start to finish. This includes such things as: identifying customers and what customers want or need, conducting market research, setting an appropriate price, estimating number of sales, planning tasks and timescales, allocating tasks and roles according to a plan, evaluating skills needed and who best able to provide them, developing effective sales and communication skills, keeping effective financial records.

Analysis of videos from the internet – setting up an enterprise activity. What else do we need to think about when setting up an enterprise activity or becoming self-employed? For example, where will it happen, market research, matching skills and interest and market need, keeping financial records, health and safety considerations.

Guest speaker to provide learners with an overview of how they planned their own enterprise activity and launched a successful business or alternatively how they planned their enterprise but failed to recognise success factors and barriers.

Learners to work in small groups to agree clear steps that are required to progress from an idea into a plan for an enterprise activity. Learners should create a group process chart or flowchart to follow and use as a reference point throughout learning.

Learners could discuss different ideas and suggestions for enterprise activities and products and complete a tutor-devised checklist to consider the costs involved. Tutor will provide prompts for production costs, such as ingredients, materials, equipment and start-up costs, such as facilities, advertising, paying for skills or training. Are there any costs that could be given for free by someone?

Learners should then set up simple spreadsheets of cost charts to calculate costs for their product or enterprise activity.

Learners should then consider the way that they could promote their product or service. Learners could discuss ideas in small groups and research different methods of promotion that are used by other organisations and enterprises.

It would be useful for learners to watch clips of TV adverts and/or review advertising from a range of newspapers, magazines and the internet. Point of sale advertising could be a useful resource.

Tutor to provide learners with sample enterprise business plans. Learners could then select a template and work in groups to develop draft plans for their enterprise. Learners could peer review their plans and make suggestions for improvement.

**Suggested time:** about 4 hours

**Activities: Carrying out an enterprise activity/self-employed work**

Learners to produce a product, for example making greeting cards, baking biscuits, making sweets, jewellery, or providing a service, for example selling ice cream or car washing.

Tutor-led lessons on project planning and how to organise and run an enterprise activity would benefit learners and lead to learners creating their own project plans. Group discussions to be used to come up with a checklist of tasks needed to carry out the activity on the day(s) chosen. The list of tasks to also be produced as an individual piece of written work or as a slide presentation.

Learners need to consider the reasons that would make an enterprise activity successful. Tutor makes a list with suggestions from learners of ideas or methods that will lead to the success of an enterprise activity. For example, identify customers, plan tasks and timescales, allocate tasks and roles to the appropriate people, use personal and practical skills appropriately.

Further practical examples, scenarios, visits and speakers may be needed to familiarise learners with the concept of business or social enterprise activities and to provide knowledge relating to methods and tasks likely to lead to the success of their enterprise activity.

Learners word shower possible products they could sell or services they could provide: products include greetings cards, handmade jewellery, cakes and biscuits; services include car washing, dog walking, gardening.

Once learners are confident that they have a solid idea and have thought through all the issues they need to present their ideas to a 'Dragon's Den' type of panel. The panel to be made up of tutors from the learning centre and external professionals. The aim of the panel is to question the viability of the product and get learners to think through anything they have not so far thought of – not to destroy their ideas and confidence.

A question-and-answer session could determine suggestions of products and services to sell and who might want to buy the product or service.

Learners should collect evidence for each step of the process and their discussions. This could be a video, print outs, diary, etc.

**Suggested time:** about 5 hours

**Activities: Reviewing the success of the enterprise**

Learners to discuss the importance of reviewing and evaluating enterprise activities in order to successfully develop future activities and improve own skills and behaviours.

Learners should then work in small groups to identify different ways that they could evaluate and review the success of an enterprise activity. Learners should consider how they could gather feedback, how they can prove success or failure and how they can collect data and statistics.

Learners look at the importance of keeping records: show cost of producing product or service; recording numbers of product or service sold; income before costs; profits/losses.

Learners could produce a checklist or evaluation form to evaluate the success of enterprise activity: what went well; what went less well; number of sales and profit made/not made; reasons for success or failure, e.g. quality of the product, venue, cost, weather, advertising, footfall; what could be done differently if enterprise activity is run again.

**Suggested time:** 2 hours

**Activity: Preparation for assessment**

The tutor reminds learners of the requirements of the assignment brief and answers any further questions that learners may have.

Group recap on key unit concepts and topics with the tutor using direct questioning to challenge learners and check understanding.

**Suggested time:** about 1 hour

**Activity: Post assessment**

Learners will take part in a group discussion to highlight the key points from the unit and how these can be used for their future progression.

Learners reflect on the notes they have produced from reference documents. They summarise what they have gained from the unit and how this will help them with their progression.

**Suggested time:** about 1 hour

## **Suggested assessment activity**

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set duration in which to complete the activity. The activity below is a suggested example. Centres are encouraged to design their own assessment activities based on the interests of the learner and the resources available locally.

### **Task**

Your task is to devise and carry out an enterprise or entrepreneurial activity.

You will need to consider factors that contribute to a successful entrepreneurial activity by researching and analysing successful entrepreneurs to explain their achievements, journey to success and the skills, behaviours and strategies that they have demonstrated.

Using your research, you will need to work with others to oversee the planning and delivery of an enterprise activity. You must consider whether there is a market for the enterprise, your customers, your costs, potential profits and how you will market your enterprise.

You should then produce documents that advertise your enterprise and deliver your activity within an agreed time frame.

Following your enterprise activity, you will reflect on the success of the activity and how your skills, behaviours and strategies impacted on success and what changes need to be made for the future.

You will need to decide how to present your information in an appropriate format for your target audience.

### **Retake**

The learner could consider a different entrepreneurial activity and present a new plan outlining how it could be run successfully.

## 10 Appeals

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

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

# 11 Malpractice

## Dealing with malpractice in assessment

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

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

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

The procedures we ask you to adopt vary between units that are internally assessed and those that are externally assessed.

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

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

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

### Learner malpractice

Cases of suspected learner malpractice in external assessments must be reported to Pearson immediately. Heads of Centre should complete JCQ Form M1 and submit this along with all supporting documentation (signed statements from the learner, invigilator, copies of evidence, etc) to our Investigations Processing team at [candidatemalpractice@pearson.com](mailto:candidatemalpractice@pearson.com).

Cases of suspected learner malpractice in internal assessments must be reported to Pearson if the learner has signed the declaration of authentication.

Heads of Centre should complete JCQ Form M1 and submit this along with all supporting documentation to our Investigations Processing team at [candidatemalpractice@pearson.com](mailto:candidatemalpractice@pearson.com). Where learners have not completed a declaration of authentication the incident does not need to be reported and centres

should follow their internal malpractice/academic misconduct policy in resolving the matter. The responsibility for determining any appropriate sanctions on learners lies with Pearson.

Failure to report malpractice constitutes staff or centre malpractice.

### **Teacher/centre malpractice**

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

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

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

### **Sanctions and appeals**

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

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

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

- working with centres to create an improvement action plan
- requiring staff members to receive further training
- temporarily withholding certification of learners
- placing temporary blocks on registration of learners
- debarring staff members or the centre from delivering Pearson qualifications
- suspending or withdrawing centre approval status.

The centre will be notified if any of these apply.

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

## 12 Further information and publications

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

All centres offering external assessments must comply with the Joint Council for Qualifications (JCQ) document *Instructions for conducting examinations*.

Further documents that support the information in this specification:

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

## 13 Glossary

### Part A – General terminology used in specification

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

## Part B – Terms used in knowledge and understanding criteria

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Analyse	Examine methodically and in detail, typically in order to interpret.
Assess	Consideration of all factors or events that apply, to identify those which are the most important or relevant and make a judgement.
Compare	Identify the main factors relating to two or more items/situations, explaining the similarities and differences or advantages and disadvantages, and in some cases say which is best and why.
Describe	Give a clear account in their own words, including all the relevant information (e.g. qualities, characteristics or events, etc.). Description shows recall and in some cases application.
Detailed	Having additional facts or information beyond a simple response.
Evaluate	Bring together all information and review it to form a supported conclusion, drawing on evidence, including strengths, weaknesses, alternative actions, relevant data or information.
Explain	Provide details and give reasons and/or evidence to support an opinion, view or argument.  OR  Provide details and give relevant examples to clarify and extend a point. This would usually be in the context of learners showing their understanding of a technical concept or principle.
Explore	inquire into or discuss (a complex or unfamiliar subject) in detail.
Identify	Shows the main features or purpose of something. Can recognise it and/or name characteristics or facts that relate to it.
Outline	Provide a summary or overview or brief description.
State	Express information in clear and precise terms.

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