

# Guidance and units

## BTEC Short Courses

### Edexcel Level 2 BTEC Award, Certificate and Diploma in WorkSkills

For first teaching September 2008  
August 2008

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

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

*References to third party material made in this specification are made in good faith. Edexcel does not endorse, approve or accept responsibility for the content of materials, which may be subject to change, or any opinions expressed therein. (Material may include textbooks, journals, magazines and other publications and websites.)*

Authorised by Roger Beard  
Prepared by Leanne Elliott

All the material in this publication is copyright  
© Edexcel Limited 2008

# Contents

---

<b>Qualification titles covered by this specification</b>	<b>1</b>
<b>Introduction</b>	<b>2</b>
<b>BTEC Short Courses at Levels Entry – Level 3</b>	<b>3</b>
<b>Rules of combination</b>	<b>4</b>
<b>Rules of combination for the Edexcel Level 2 BTEC qualifications in WorkSkills</b>	<b>4</b>
Structure of the Edexcel Level 2 BTEC Qualifications in WorkSkills	6
<b>Key features</b>	<b>7</b>
Edexcel Level 2 BTEC Award, Certificate and Diploma in WorkSkills	7
<b>Unit format</b>	<b>7</b>
<b>Assessment and grading</b>	<b>9</b>
Accreditation of Prior Learning (APL)	10
<b>Quality assurance</b>	<b>10</b>
Approval	10
Quality Assurance Handbook	11
<b>Programme design and delivery</b>	<b>11</b>
Mode of delivery	11
Resources	12
Delivery approach	12
<b>Access and recruitment</b>	<b>12</b>
Restrictions on learner entry	13
Access arrangements and special considerations	13
<b>Functional skills</b>	<b>13</b>
<b>The wider curriculum</b>	<b>14</b>
<b>Useful publications</b>	<b>15</b>
<b>Professional development and training</b>	<b>15</b>
<b>Further information</b>	<b>16</b>

<b>Units</b>	<b>17</b>
Unit 1: Alternatives to Paid Work	19
Unit 2: Working as a Volunteer	25
Unit 3: Managing Your Own Money	31
Unit 4: Searching for a Job	37
Unit 5: Applying for a Job	43
Unit 6: Preparing for an Interview	49
Unit 7: Interview Skills	53
Unit 8: Self-management Skills	59
Unit 9: Self-assessment	65
Unit 10: Career Progression	71
Unit 11: Developing Personal Skills for Leadership	79
Unit 12: Practising Leadership Skills with Others	85
Unit 13: Learning with Colleagues and Other Learners	91
Unit 14: Communicating Solutions to Others	97
Unit 15: Effectiveness at Work	105
Unit 16: Working in a Team	111
Unit 17: Learning from More Experienced People	119
Unit 18: Building Working Relationships with Colleagues	127
Unit 19: Building Working Relationships with Customers	135
Unit 20: Investigating Rights and Responsibilities at Work	143
Unit 21: Managing Your Health at Work	149
Unit 22: Setting and Meeting Targets at Work	153
Unit 23: Solving Work-related Problems	159
Unit 24: Summarising Documents	165
Unit 25: Contributing to Meetings	171
Unit 26: Preparing for Work Placement	179
Unit 27: Learning from Work Placement	187
Unit 28: Planning an Enterprise Activity	193
Unit 29: Running an Enterprise Activity	199
Unit 30: Producing a Product	205





# Qualification titles covered by this specification

Edexcel Level 2 BTEC Award in WorkSkills

Edexcel Level 2 BTEC Certificate in WorkSkills

Edexcel Level 2 BTEC Diploma in WorkSkills

These qualifications have been accredited to the Qualifications and Credit Framework (QCF) and are eligible for public funding as determined by the DCSF under Sections 96 and 97 of the Learning and Skills Act 2000.

The qualification titles listed above feature in the funding lists published annually by the DCSF and the regularly updated website [www.dcsf.gov.uk/](http://www.dcsf.gov.uk/). The QCF Qualifications Accreditation Number (QAN) should be used by centres when they wish to seek public funding for their learners. The QAN for these qualifications are listed in *Annexe A*.

These qualification titles are as they will appear on learners' certificates. Learners need to be made aware of this when they are recruited by the centre and registered with Edexcel. Providing this happens, centres are able to describe the programme of study leading to the award of the qualifications in different ways to suit the medium and the target audience.

# Introduction

This document contains the associated guidance and units for the Qualifications and Credit Framework (QCF) Edexcel Level 2 BTEC Award, Certificate and Diploma in WorkSkills. Each unit sets out the required outcomes, assessment criteria and content and includes advice regarding appropriate delivery and assessment strategies. The guidance contains further details of the assessment and quality assurance of this qualification. It includes advice about Edexcel's policy regarding access to its qualifications, the design of programmes of study and delivery modes.

Centres should note that the qualifications set out in this specification have been developed in consultation with centres and employers, particularly with Asset Skills, the employability Sector Skills Council. The units are designed to meet the skill needs of employees.

These qualifications are part of the Qualifications and Credit Framework. This framework will replace the National Qualifications Framework (NQF). The QCF is designed to be:

- more responsive to learner and employer needs
- demand and market led
- simple, flexible and have currency for learners
- underpinned by a credit system that recognises achievement of units and qualifications.

BTEC Short Courses are designed to meet a range of different needs. BTEC Short Courses at Entry and Levels 1-3 offer:

- maximum flexibility in the design of programmes
- the opportunity to use a range of delivery methods
- the opportunity to certificate smaller blocks of learning which are designed to motivate learners and encourage widening participation in education and training
- courses that relate to the particular training and employment patterns in a sector
- courses that may offer preparation for specific jobs and subsequent achievement of NVQs or Apprenticeship Diplomas when in employment
- opportunities for learners to develop skills that support career and professional development
- underpinning knowledge, skills and understanding linked, where appropriate, to named NVQs
- programmes that can enable progression either to higher levels of study or to other courses at the same level of study.

## BTEC Short Courses at Levels Entry–Level 3

QCF level

3

Edexcel Level 3 BTEC Award...

Edexcel Level 3 BTEC Certificate...

Edexcel Level 3 BTEC Diploma...

2

Edexcel Level 2 BTEC Award...

Edexcel Level 2 BTEC Certificate...

Edexcel Level 2 BTEC Diploma...

1

Edexcel Level 1 BTEC Award...

Edexcel Level 1 BTEC Certificate...

Edexcel Level 2 BTEC Diploma...

E3

Edexcel Entry Level 3 BTEC Award

Edexcel Entry Level 3 BTEC Certificate

Edexcel Entry Level 3 BTEC Diploma

Credit value

13-36

Above 36

# Rules of combination

Rules of combination are critical to qualifications as they set out:

- what a learner is required to do to be awarded a qualification
- the potential for learners to transfer credit between different qualifications and awarding bodies.

Rules of combination:

- the mechanisms through which sets of achievement are grouped together into a qualification in the QCF, in a way consistent with the qualification rationale
- specify the credits that need to be achieved, through particular units, for a qualification to be awarded
- describe the widest range of opportunities for credit accumulation and transfer consistent with the qualification rationale
- will apply to all qualifications in the QCF
- do not exist outside the context of a qualification.

## Rules of combination for the Edexcel Level 2 BTEC qualifications in WorkSkills

In achieving a BTEC WorkSkills qualification, the learner may choose from 88 WorkSkills units. Each unit has been assigned an appropriate number of credits.

To be awarded the Edexcel Level 2 BTEC Award in WorkSkills the learner must achieve a minimum of 3 credits.

To be awarded the Edexcel Level 2 BTEC Certificate in WorkSkills the learner must achieve a minimum of 13 credits.

To be awarded the Edexcel Level 2 BTEC Diploma in WorkSkills the learner must achieve a minimum of 37 credits.

In order to be awarded an Edexcel Level 2 BTEC in WorkSkills qualification, at least 60 percent of the credits achieved by the learner must be at Level 2.

This means:

To be awarded the Edexcel Level 2 BTEC Award in WorkSkills the learner must achieve at least 2 credits at Level 2.

To be awarded the Edexcel Level 2 BTEC Certificate in WorkSkills the learner must achieve at least 8 credits at Level 2.

To be awarded the Edexcel Level 2 BTEC Diploma in WorkSkills the learner must achieve at least 23 credits at Level 2.

\*The tables below show some examples of combinations of credits for achieving a Level 2 BTEC Award, Certificate and Diploma in WorkSkills.

Qualification: Edexcel BTEC Level 2 Award in WorkSkills	Minimum number of credits at Level 2	Minimum number of credits at Level 1	Minimum number of credits at Entry Level
Example A	3	0	0
Example B	2	1	0
Example C	2	0	1

Qualification: Edexcel BTEC Level 2 Certificate in WorkSkills	Minimum number of credits at Level 2	Minimum number of credits at Level 1	Minimum number of credits at Entry Level
Example A	13	0	0
Example B	8	5	0
Example C	8	4	1
Example D	8	3	2

Qualification: Edexcel BTEC Level 2 Diploma in WorkSkills	Minimum number of credits at Level 2	Minimum number of credits at Level 1	Minimum number of credits at Entry Level
Example A	37	0	0
Example B	36	1	0
Example C	23	7	7
Example D	23	14	0

\* These tables show some examples of combinations of credits. Other combinations of credits may be possible within the rules of combination specified in this section.

## Structure of the Edexcel Level 2 BTEC Qualifications in WorkSkills

Units		Credit value
Unit 1	Alternatives to Paid Work	1
Unit 2	Working as a Volunteer	2
Unit 3	Managing Your Own Money	2
Unit 4	Searching for a Job	1
Unit 5	Applying for a Job	1
Unit 6	Preparing for an Interview	1
Unit 7	Interview Skills	1
Unit 8	Self-management Skills	2
Unit 9	Self-assessment	2
Unit 10	Career Progression	2
Unit 11	Developing Personal Skills for Leadership	2
Unit 12	Practising Leadership Skills with Others	2
Unit 13	Learning with Colleagues and Other Learners	2
Unit 14	Communicating Solutions to Others	2
Unit 15	Effectiveness at Work	1
Unit 16	Working in a Team	3
Unit 17	Learning from More Experienced People	2
Unit 18	Building Working Relationships with Colleagues	2
Unit 19	Building Working Relationships with Customers	2
Unit 20	Investigating Rights and Responsibilities at Work	1
Unit 21	Managing Your Health at Work	1
Unit 22	Setting and Meeting Targets at Work	2
Unit 23	Solving Work-related problems	2
Unit 24	Summarising Documents	1
Unit 25	Contributing to Meetings	1
Unit 26	Preparing for Work Placement	1
Unit 27	Learning from Work Placement	2
Unit 28	Planning an Enterprise Activity	1
Unit 29	Running an Enterprise Activity	1
Unit 30	Producing a Product	1

## Key features

BTEC Short Course Awards, Certificates and Diplomas are designed to provide focused and specialist work-related qualifications in a range of sectors. The qualifications can provide a specialist emphasis for learners following a general vocational programme of study. BTEC Short Courses offer focused qualifications for learners, particularly more mature learners, who wish to follow a short programme of study directly related to their work experience or to an aspect of employment that they wish to move into.

On successful completion of these qualifications, learners may progress into or within employment and/or continue their study in the vocational area.

### Edexcel Level 2 BTEC Award, Certificate and Diploma in WorkSkills

The Edexcel Level 2 BTEC Award, Certificate and Diploma in WorkSkills have been designed to provide:

- the knowledge, understanding and skills learners need to enter employment
- opportunities for learners to gain a nationally recognised qualification relating to work skills
- opportunities for employees to achieve a nationally recognised Level 2 qualification
- opportunities for learners to focus on the development of functional skills in English, Mathematics and ICT
- opportunities for learners to develop a range of skills and techniques, personal qualities and attitudes essential for successful performance in working life.

## Unit format

All units in Edexcel QCF BTEC Short Courses have a standard format which is designed to provide clear guidance on the requirements of the qualification for learners, tutors, assessors and those responsible for monitoring national standards.

Each unit is set out in the following way.

### *Unit title*

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

### *QCF Level*

All units and qualifications within the QCF will have a level assigned to them, which represents the level of difficulty. There are nine levels of achievement, from Entry Level to Level 8.

### *Credit value*

A credit value specifies the number of credits that will be awarded to a learner who has achieved all the learning outcomes of the unit. The credit value of the unit will remain constant in all contexts, regardless of the assessment method used for the qualification(s) to which it contributes. One credit is awarded for those learning outcomes achievable in 10 hours of learning time (which includes learner-initiated private study and assessment time).

### *Guided learning hours*

Guided learning hours is 'a notional measure of the substance of a unit'. It includes an estimate of time that might be allocated to direct teaching, instruction and assessment, together with other structured learning time such as directed assignments or supported individual study. It excludes learner-initiated private study. Centres are advised to consider this definition when planning the programme of study associated with this specification.

### *Unit abstract*

The unit abstract is designed to give the reader an appreciation of the value of the unit in the vocational setting of the qualification as well as highlighting the focus of the unit. It provides the reader with a snapshot of the aims of the unit and the key knowledge, skills and understanding developed while studying the unit.

### *Learning outcomes*

Learning outcomes state exactly what a learner should 'know, understand or be able to do' as a result of completing the unit.

### *Assessment criteria*

Each *Assessment criteria* section contains statements of the criteria used to determine the evidence that each learner must produce in order to achieve the unit.

### *Unit content*

The unit content identifies the depth and breadth of knowledge, skills and understanding needed to design and deliver a programme of learning sufficient to achieve each of the learning outcomes. The content provides the range of subject material for the programme of learning and specifies the skills, knowledge and understanding required for achievement of the pass grading criteria.

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

The unit content section will often have lists of topics that provide the range of the subject material required to be covered in order to meet the assessment criteria. Subject material may be further detailed by lists enclosed within brackets or an elongated dash which provide the defined elements of the specific topic item. Where the subject material list includes an 'eg', it should be noted that this provides an indicative range of material to support the specific topic item.

### *Essential guidance for tutors*

This section is designed to give tutors additional guidance and amplification on the unit in order to provide for a coherence of understanding and a consistency of delivery and assessment. It is divided into the following sections:

- *Delivery* – explains the content and its relationship to the learning outcomes and offers guidance about possible approaches to delivery. This advice is based on the more usual delivery modes but is not intended to rule out alternative approaches.

- *Assessment* – provides amplification about the nature and type of evidence that learners need to produce in order to pass the unit. This section should be read in conjunction with the assessment criteria.
- *Links to other BTEC units, other BTEC qualifications and other relevant units and qualifications* – sets out links with other units within the qualification. These could be used to ensure that learners can relate different aspects within the qualification and offer opportunities for integration of learning, delivery and assessment.
- *Essential resources* – identifies any specialist resources needed to allow learners to generate the evidence required for each unit. The centre will be asked to ensure that any requirements are in place when it seeks approval from Edexcel to offer the qualification.
- *Websites* – provides additional sources of information for deliverers and may list websites accessible for learners at the relevant level of study.

## Assessment and grading

The assessment for the Edexcel Level 2 BTEC Award, Certificate and Diploma in WorkSkills is criterion referenced, based on the achievement of specified criteria. Each unit contains contextualised assessment criteria for unit assessment.

In the Edexcel Level 2 BTEC Award, Certificate and Diploma in WorkSkills, all units are internally assessed. The overall grading is a pass, based upon the successful achievement of the required number of credits.

Centres are encouraged to use a variety of assessment methods, including assignments, tasks, short tests, case studies and work-based assessments, along with projects and performance observation. Practical application of the assessment criteria in a realistic scenario should be emphasised and maximum use made of practical work experience.

Assignments constructed for assessment by centres should be valid, reliable and fit for purpose, building on the application of the assessment criteria. Care must be taken to ensure that assignments used for assessment of a unit cover all the criteria for that unit as set out in the *Assessment criteria* section of that unit. It is advised that the criteria which an assignment is designed to cover should be clearly indicated in the assignment to (a) provide a focus for learners (for transparency and to help ensure that feedback is specific to the criteria) and (b) assist with internal verification processes. Tasks and activities should enable learners to produce evidence that directly relates to the specified criteria.

The creation of assignments that are fit for purpose is vital to achievement by learners and their importance cannot be over-emphasised.

## Accreditation of Prior Learning (APL)

Edexcel encourages centres to recognise learners' previous achievements and experience through APL. Learners may have evidence that has been generated during previous study or in their previous or current employment or whilst undertaking voluntary work that relates to one or more of the units in the qualification. Assessors should assess this evidence against the national standards in the specifications in the normal way. As with all evidence, assessors should be satisfied about the authenticity and currency of the material when considering whether or not the outcomes of the unit have been met.

Full guidance about Edexcel's policy on APL is provided on our website:  
[www.edexcel.com](http://www.edexcel.com)

## Quality assurance

BTEC WorkSkills qualifications provide a flexible structure for learners enabling programmes of varying credits and combining different levels. For the purposes of quality assurance, all individual qualifications and units are considered as a whole. Centres delivering the BTEC qualifications in WorkSkills must be committed to ensuring the quality of the units and qualifications they deliver, through effective standardisation of assessors and verification of assessor decisions. Centre quality assurance and assessment is monitored and guaranteed by Edexcel.

The Edexcel quality assurance processes will involve:

- centre approval for those centres not already recognised as a centre for BTEC qualifications
- approval for the whole suite of WorkSkills qualifications and units
- **compulsory** Edexcel-provided training and standardisation for internal verifiers and assessors
- centre risk assessment by Edexcel of overarching processes and quality standards
- remedial training and/or assessment sampling for centres identified through standardisation or risk assessment activities, as having inadequate quality, assessment or internal verification processes.

## Approval

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

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

## Quality Assurance Handbook

Details of quality assurance for the BTEC WorkSkills qualifications are set out in a centre handbook which will be published annually on [www.edexcel.com](http://www.edexcel.com)

## Programme design and delivery

At Level 2, learners may choose from 88 units. Each unit has a recommended number of guided learning hours. The definition of guided learning hours is ‘a notional measure of the substance of a qualification’. It includes an estimate of time that might be allocated to direct teaching, instruction and assessment, together with other structured learning time such as directed assignments or supported individual study. It excludes learner-initiated private study. Centres are advised to consider this definition when planning the programme of study associated with this specification.

### Mode of delivery

Edexcel does not define the mode of study for BTEC qualifications. Centres are free to offer the qualifications using any mode of delivery that meets the needs of their learners. This may be through traditional classroom teaching, open learning, distance learning or a combination of these. Whatever mode of delivery is used, centres must ensure that learners have appropriate access to the resources identified in the specifications and to the subject specialists delivering the units. This is particularly important for learners studying for the qualification through open or distance learning.

Learners studying for the qualification on a part-time basis bring with them a wealth of experience that should be utilised to maximum effect by tutors and assessors. Assessment instruments based on the learner’s work environment should be encouraged. Those planning the programme should aim to enhance the vocational nature of the BTEC qualifications by:

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

## Resources

BTEC qualifications are designed to prepare learners for employment. Physical resources need to support the delivery of the programme and the proper assessment of the outcomes and therefore, should normally be of industry standard. Staff delivering programmes and conducting the assessments should be fully familiar with current practice and standards in employability. Centres will need to meet any specialist resource requirements when they seek approval from Edexcel.

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

Edexcel resources relevant to the BTEC WorkSkills qualifications include WorkSkills Activator Workbooks produced by Pearson Edexcel Learning and distributed by Heinemann (see [www.heinemann.co.uk](http://www.heinemann.co.uk) for details on ordering).

Additionally, Trident from Edexcel provides services aimed at helping young people improve their employability skills and develop as individuals, as well as making the work placement process as easy as possible for employers, learners, schools and colleges. See [www.trident-edexcel.co.uk](http://www.trident-edexcel.co.uk) for further details.

## Delivery approach

It is important that centres develop an approach to teaching and learning that supports the vocational nature of the Edexcel Level 2 BTEC Award, Certificate and Diploma in WorkSkills. The qualifications contain a balance of practical skill development and knowledge requirements, some of which can be theoretical in nature. Tutors and assessors need to ensure that appropriate links are made between theory and practice and that the knowledge base is applied in a context familiar to the learner. This will require the development of relevant and up-to-date teaching materials which allow learners to apply their learning to actual events and relevant activities. Maximum use should be made of the learner's experience.

## Access and recruitment

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

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

Centres are required to recruit learners to BTEC qualifications with integrity. This will include ensuring that applicants have appropriate information and advice about the qualifications and that the qualification will meet their needs. Centres should take appropriate steps to assess each applicant's potential and make a professional judgement about their ability to successfully complete the programme of study and achieve the qualification. This assessment will need to take account of the support

available to the learner within the centre during their programme of study and any specific support that might be necessary to allow the learner to access the assessment for the qualification. Centres should also show regard for Edexcel's policy on learners with particular requirements.

Centres will need to review the profile of qualifications and/or experience held by applicants, considering whether this profile shows an ability to progress to a Level 2 qualification. For learners who have recently been in education, the profile is likely to include one of the following:

- a standard of literacy and numeracy supported by a general education equivalent to GCSEs at grade A\*-C
- related work experience
- other related Level 2 qualifications.

More mature learners may present a more varied profile of achievement that is likely to include experience of paid and/or unpaid employment.

### **Restrictions on learner entry**

The Edexcel Level 2 BTEC in WorkSkills is accredited on the QCF for learners aged 14 years and over.

Under QCA accreditation regulations, learners under the age of 16 may not undertake qualifications requiring more than 360 guided learning hours. As a result, centres should ensure that learners under the age of 16 registered for the BTEC Level 2 Diploma in Workskills choose an appropriate combination of units that will allow the learner to achieve 37 credits without exceeding 360 guided learning hours.

### **Access arrangements and special considerations**

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

Further details are given in the policy *Access Arrangements and Special Considerations for BTEC and Edexcel NVQ Qualifications*, which is on our website ([www.edexcel.com](http://www.edexcel.com)). This policy replaces the previous Edexcel policy (*Assessment of Vocationally Related Qualification: Regulations and Guidance Relating to Learners with Special Requirements, 2002*) concerning learners with particular requirements.

## **Functional skills**

The units in the WorkSkills qualifications provide inherent opportunities for learners to practise and enhance their functional skills. Some units in the WorkSkills qualifications focus specifically on functional skills, for example *Managing Your Own Money*, *Being Responsible for Other People's Money*, *Taking Notes at Meetings*, *Summarising Documents* and *Contributing to Meetings*.

Functional skills are transferable skills which play an essential role in developing personal effectiveness for adult and working life and in the application of specific vocational skills. Centres should refer to the QCA website ([www.qca.org.uk](http://www.qca.org.uk)) for the latest functional skills standards.

Functional skills provide a foundation for continual learning. They enable and empower individuals who inevitably face a series of choices in work, education and training throughout their lives. Current and future initiatives such as Learndirect, Lifelong Learning, and widening participation all require a more flexible population in the workplace and functional skills play a role in setting the framework.

Learners need the chance to show current and future employers that they can:

- communicate effectively, in a variety of situations, using a wide range of techniques
- use numeracy, not just within routine tasks and functions, but to help them be more effective and efficient in all they do
- use ICT in a range of applications to support all aspects of their role.

## The wider curriculum

Study of the Edexcel Level 2 BTEC Award, Certificate and Diploma in WorkSkills provides opportunities for the learner to develop an understanding of moral, ethical, social and cultural issues and an awareness of environmental issues, health and safety considerations, and European developments.

### **Moral, ethical, social and cultural issues**

Moral, ethical, social and cultural issues are encountered throughout the qualifications when learners are dealing with colleagues, employers, customers, other learners and visiting speakers. Learners will also consider the factors that may have an effect on work skills, including social and cultural skills.

### **Environmental issues**

Learners will learn to appreciate the importance of a working in a safe environment and how to ensure that it remains safe whilst they are there.

### **European developments**

Much of the content of the qualifications applies throughout Europe, even though delivery is in a UK context. Although the majority of legislation studied in the qualifications from the UK, some reference is made to EU law.

### **Health and safety considerations**

Health and safety is embedded in many of the units in these qualifications. Specific units have been designed to consider safe learning in the workplace.

## Equal opportunities issues

Equal opportunities issues are implicit throughout the Edexcel Level 2 BTEC Award, Certificate and Diploma in WorkSkills.

## Useful publications

Further copies of this document and related publications can be obtained from:

Edexcel Publications

Adamsway

Mansfield

Nottinghamshire NG18 4FN

Telephone: 01623 467 467

Fax: 01623 450 481

Email: [publications@linneydirect.com](mailto:publications@linneydirect.com)

Related publications include:

- the current Edexcel publications catalogue and update catalogue
- functional skills publications – specifications, tutor support materials and question papers
- *Accreditation of Prior Learning* – available on our website: [www.edexcel.com](http://www.edexcel.com)
- *Working specification for the Qualifications and Credit Framework test and trials* (QCA, 2006)
- *The Statutory Regulation of External Qualifications in England, Wales and Northern Ireland* (QCA, 2004).

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

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

## Professional development and training

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

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

- planning for the delivery of a new programme
- planning for assessment and grading
- developing effective assignments

- building your team and teamwork skills
- developing student-centred learning and teaching approaches
- building key skills into your programme
- building in effective and efficient quality assurance systems.

The national programme of training we offer can be viewed on the Edexcel website ([www.edexcel.com/training](http://www.edexcel.com/training)). You can request customised training through the website or by contacting one of our advisers in the Training from Edexcel team via Customer Services on 0844 576 0026 to discuss your training needs (calls may be recorded for training purposes).

The training we provide:

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

## Further information

Edexcel produces regular policy statements on Edexcel qualifications and accompanying procedures. Please check our website for current information.

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

# Units



# Unit 1: Alternatives to Paid Work

QCF Level: Level 2

Credit value: 1

Guided learning hours: 10

---

## Unit abstract

The aim of this unit is to help learners to understand the different types of beneficial alternatives to paid work and how they could use the skills and qualities gained through participating in these different activities in other areas of their lives. The learner will also learn about the role of organisations associated with beneficial alternatives to paid work.

## Learning outcomes and assessment criteria

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

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Understand different beneficial alternatives to paid work	1.1 Describe different types of beneficial alternatives to paid work 1.2 Explain how the different types of beneficial alternatives to paid work differ
2 Understand the role of organisations associated with beneficial alternatives to paid work	2.1 Describe the role of different organisations associated with beneficial alternatives to paid work
3 Understand the skills, qualities and knowledge that can be gained from beneficial alternatives to paid work	3.1 Explain different types of skills, qualities and knowledge that can be gained through participating in activities associated with beneficial alternatives to paid work
4 Understand how to transfer the skills, qualities and knowledge gained from beneficial alternatives to paid work to other areas of life	4.1 Explain what steps they might need to take in order to use the gained skills, qualities or knowledge in other areas of their life

## Unit content

---

### 1 Understand different beneficial alternatives to paid work

*Different types of beneficial alternatives to paid work:* voluntary activities eg volunteering for local charity organisation or community organisation; family care responsibilities eg caring for young child or disabled family member; leisure activities eg sports or other hobbies; study or training eg via internet or at local college; compulsory activities eg community service order, supervision order

*Differences in alternatives to paid work:* voluntary activities eg may involve helping others, may be a charitable organisation, expenses may be paid; family care responsibilities eg may have no choice, may be isolating, limits leisure time; leisure activities eg freely chosen, takes place in own time; study or training activities eg may not be free, may be full-time/part-time, may involve expenditure; compulsory supervision order/community service order eg penalties if not completed

### 2 Understand the role of organisations associated with beneficial alternatives to paid work

*Role of different organisations:* provide information on opportunities to get involved in beneficial alternatives to paid work and steps to take in order to get involved; provide information about any requirements or restrictions on being involved in an alternative to paid work eg minimum time commitment, age restrictions, travel, skills/experience/qualifications required; provide support, advice and guidance for those involved in beneficial alternatives to paid work eg legal, financial and ethical matters, advice and support on emotional or personal matters, access to practical help, support resources, networking with others involved in same or similar activities, advice on paid employment opportunities, training and education

### 3 Understand the skills, qualities and knowledge that can be gained from beneficial alternatives to paid work

*Skills, qualities and knowledge:* interpersonal skills eg teamwork, communication, willingness to learn, ability to listen to others, ability to motivate or encourage others; technical or specialised skills eg learn to cook, care for young children, operate piece of equipment or machinery; personal qualities eg confidence, patience, empathy, determination, perseverance, punctuality, dependability, flexibility, loyalty, sense of responsibility, self-discipline; knowledge eg gain experience and understanding in a particular area, achieve qualifications

**4 Understand how to transfer the skills, qualities and knowledge gained from beneficial alternatives to paid work to other areas of life**

*Steps that might be needed in order to use the gained skills, qualities or knowledge in other areas of their life:* eg set personal goals to use the learning, qualities or skills gained from involvement in alternatives to paid work, investigate options for further study in order to build on new skills or gain paid employment, use a qualification to gain voluntary or paid work, request reference from voluntary employment activities for future employer, use new sense of self-confidence to enrol on course at local college or join keep-fit classes, use skills from training course to help children with their homework, use skills as child-carer to work as helper at grandchild's school

## Essential guidance for tutors

---

### Delivery

This unit can be used in a variety of contexts. Delivery will depend on the particular circumstances of the learner but may include learners already or previously involved in alternatives to paid work, as well as those with no current or previous involvement in alternatives to paid work. Some of these contexts will emphasise identifying skills acquired or needed and their transferability into other work contexts. This unit could therefore, be used, for example, by home makers to show how the skills that they have developed could help them find employment. Other contexts may involve potential learners using skills gained from alternatives to paid work to assist them in enrolling on an appropriate training course. Delivery, therefore, could be centred on using the learner as a case study or a case study of another individual.

Contexts could include the following:

- home makers
- home carers looking after, for example, young children or ill relatives
- learners considering a gap year
- leisure activities
- further study
- returners to work
- volunteering and/or community service.

Tutors delivering this unit have the opportunity to use a wide range of resources including presentations, seminars, practical workshops, interviews (eg face-to-face, phone interviews), projects, assignments, external trips and guest speakers. Additional learning resources could include journals, videos, DVDs, case studies, learner presentations and group work.

Learners could undertake visits to different organisations that offer alternatives to paid work. On return to class, they could write up their notes and use the information to report back to the rest of the group.

Guest speakers, DVDs and case studies could give learners an understanding of the differences and similarities between different types of alternatives to paid work for learning outcome 1.

For learning outcome 2, learners should be given opportunities to find out relevant information about the services provided by organisations associated with appropriate alternatives to paid work. An internet search may be undertaken, or learners may visit, write or telephone appropriate organisations to gain an understanding of the role these organisations play.

Tutors/line managers could give learners case studies to analyse in order to determine the skills, qualities and knowledge gained from alternatives to paid work and how they may be transferable to other areas of life. A question and answer session could help learners develop knowledge and understanding of this concept for learning outcome 3.

The case studies used for learning outcome 3 could also be used to determine transferability of skills for learning outcome 4. Alternatively, tutors may wish to give learners the opportunity to participate in a group discussion, or question and answer session with a visiting speaker, about how to transfer the skills, qualities and knowledge gained from alternatives to paid work to other areas of life. Learners could record the ideas gathered individually or in groups.

## **Assessment**

For 1.1, the learner should be able to describe at least three different types of beneficial alternatives to paid work, and provide an example for each type.

In order to achieve 1.2, the learner will need to explain the similarities and differences between three different alternatives to paid work. This information could be evidenced in a number of different ways, for example presented in the form of a table, as PowerPoint slides, in a leaflet or as guidance notes for other learners.

For 2.1, the learner should be able to describe two different types of organisations and, for each, describe two different types of services or roles the organisation performs. Learners will need to identify the sources of their information. Evidence for 2.1 could be combined in a presentation with evidence for 1.2.

For 3.1, the learner should explain the skills, knowledge and qualities that can be gained through participating in alternatives to paid work. Explanations need not be lengthy, but must demonstrate a clear understanding of the nature and value of the skill, knowledge or quality gained. In achieving 3.1, the learner may draw on one or more examples of alternatives to paid work. In total, the learner should be able to explain at least three skills, qualities or types of knowledge gained and the three examples should be sufficiently varied or dissimilar. 3.1 may be evidenced in a chart, table, poster or other appropriate method.

For 4.1, the learner must explain what steps they might need to take in order to use the gained skills, qualities or knowledge in other areas of their life. At least one suggested step is required for each of the three skills, qualities or aspects of knowledge referred to in 3.1. In achieving 4.1, the explanations must show a clear understanding of an action to be taken in order to apply the knowledge, skill or quality to an area of their life.

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

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

Entry Level	Level 1	Level 2
Unit 1: Alternatives to Paid Work	Unit 1: Alternatives to Paid Work	Unit 2: Working as a Volunteer
Unit 2: Working as a Volunteer	Unit 2: Working as a Volunteer	

## Resources

Learners will need access to appropriate sources of information on alternatives to paid work such as websites, community noticeboards, magazines, newspapers, representatives of organisations and societies.

## Websites

[www.carersuk.org](http://www.carersuk.org)

[www.direct.gov.uk/en/HomeAndCommunity/Gettinginvolvedinyourcommunity](http://www.direct.gov.uk/en/HomeAndCommunity/Gettinginvolvedinyourcommunity)

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

[www.learndirect.co.uk](http://www.learndirect.co.uk)

[www.princes-trust.org.uk](http://www.princes-trust.org.uk)

[www.theaward.org](http://www.theaward.org)

[www.yearoutgroup.org](http://www.yearoutgroup.org)

## Unit 2: Working as a Volunteer

QCF Level: Level 2

Credit value: 2

Guided learning hours: 10

---

### Unit abstract

The skills used during voluntary work may benefit the personal and career plans of the volunteer. The learner will find out about how to become a volunteer and apply for voluntary work that suits their skills and interests. They will consider the expectations of the volunteer in the voluntary work they applied for, including the nature of the work and the behaviours and attitudes required. The learner will complete a voluntary work task which interests them and matches their skills. This unit also helps the learner to understand how skills developed during work as a volunteer may benefit them in the future.

An essential element of this unit is participation in voluntary work. A specified time for the voluntary work is not given, however it must be sufficient to allow the learner to gain the knowledge and experience necessary to achieve the learning outcomes.

### Learning outcomes and assessment criteria

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

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Be able to find voluntary work	1.1 Identify ways to become a volunteer 1.2 Apply for voluntary work which matches their skills and interests
2 Understand what is expected of the volunteer in undertaking the voluntary work	2.1 Explain the nature of the work to be undertaken 2.2 Explain behaviours and attitudes needed to undertake the work
3 Be able to undertake voluntary work	3.1 Complete a voluntary work task which the learner has identified as matching their skills and interests

Learning outcomes	Assessment criteria
The learner will:	The learner can:
4 Understand that the skills used during voluntary work may be of benefit to personal or career plans	4.1 Describe how the skills used during the time as a volunteer may be useful in the volunteer's future or career plans

## Unit content

---

### 1 Be able to find voluntary work

*Sources of information about voluntary work:* eg internet, reference library, magazines, newspapers, charities, local council, faith-based organisations, places of worship, Connexions, teachers/tutors, family, friends, colleagues

*Applying for suitable voluntary work:* awareness of own skills and interests; application methods eg letter, application form, email, telephone call, visit

### 2 Understand what is expected of the volunteer in undertaking the voluntary work

*Nature of the work:* tasks specific to the voluntary work eg sorting the bags of clothes that are donated to the charity shop in to those suitable for sale

*Behaviours and attitudes:* generic behaviours and attitudes eg punctuality, reliability, confidentiality, flexibility, non-judgemental attitude, kindness, patience; behaviours and attitudes specific to the voluntary work eg prepared to undertake less pleasant aspects of the work such as cleaning kennels at an animal shelter

### 3 Be able to undertake voluntary work

*Voluntary work:* suitable work which matches skills and interests eg painting a fence for the pre-school group outdoor area or clearing an overgrown churchyard would suit a learner who enjoys being outdoors, helping at a stall for a community carnival would suit a learner interested in a career in events coordination

### 4 Understand that the skills used during voluntary work may be of benefit to personal or career plans

*Skills:* communication skills; teamwork skills; interpersonal skills; willingness to learn; skills specific to the voluntary work eg learn how to communicate with a hearing-impaired person

*Benefits to personal and career plans:* new skills may change career plans; improve employability prospects; provide a reference; open up greater range of careers; demonstrate social responsibility; improve confidence and people skills; encourage further study

## Essential guidance for tutors

---

### Delivery

The emphasis of this unit is on allowing the learner to find out about suitable voluntary work that matches their skills and interests, and for the learner to apply for and undertake suitable voluntary work. Learners are also required to work towards reviewing how the voluntary work experience contributes to their personal and career plans.

In learning outcome 1, learners will need to appreciate their own skills, strengths and interests in order to find suitable voluntary work. Tutorials will give tutors the opportunity to discuss the interests and skills of individual learners in order for them to identify suitable voluntary work. Practical scenarios may also be used to help learners identify which type of voluntary work would be appropriate for them. If possible, guest speakers from charities or the local authority voluntary bureau could be invited to speak to learners.

Learners could be grouped together with those seeking similar types of voluntary work to find out about possible voluntary work experiences from a range of sources. A mixture of tutor-led input and individual learner research is required. This research could include details of the nature of the work to be undertaken. In groups, learners can discuss the behaviours and attitudes appropriate in undertaking the work for learning outcome 2. Learners will need to apply to their chosen organisation for voluntary work experience.

Learners are to undertake a voluntary work task for learning outcome 3. The task should relate to personal skills and interests which the learner has identified. Tutors should give learners a brief for the voluntary work task including the timescale in which to complete the task and any supervision arrangements. At this level, learners should not require extensive supervision in completing the voluntary task.

On returning to the school, college or place of learning, learners could write up their notes, prepare a presentation or complete a log about their voluntary work experience and use the information to consider how the skills used during their time as a volunteer may be useful in their future or career plans. Learners would benefit from the opportunity to share their experiences of voluntary work with the group and analyse how the voluntary work may benefit them in the future.

### Assessment

In order to achieve 1.1, the learner must provide a list of the sources they used to find their voluntary work. Sufficient information needs to be provided that would allow another learner to use the same sources, therefore, a factsheet or 'guidance note' could be an appropriate means to evidence this.

A copy of the letter, application form, email or record of the telephone conversation could provide the evidence for 1.2. The information needs to demonstrate how the voluntary work applied for matches the learner's skills and interests.

Learners could produce a logbook or presentation which explains the nature of the work to be undertaken in the voluntary work task and the behaviours and attitudes appropriate in undertaking the work, to achieve 2.1 and 2.2.

3.1 requires the learner to complete a voluntary work task according to a given brief. The brief should detail the length of time that the learner should spend participating in the voluntary task, what they hope to achieve and how they are going to achieve it. The learner could use a logbook or presentation to record their experiences. The logbook or presentation will need to be verified by the tutor. Alternative methods of evidencing the voluntary work may be used, for example a reference from the supervisor or line manager, or a certificate of attendance.

In order to achieve 4.1, the learner needs to describe how the skills used during their time as a volunteer may be useful in their future or career plans. To achieve this, the learner must identify the skills they gained during the voluntary work task and then describe how they could be used in future work or personal plans. Reference needs to be made to the voluntary work experience completed for 3.1.

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

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

Entry Level	Level 1	Level 2
Unit 1: Alternatives to Paid Work	Unit 1: Alternatives to Paid Work	Unit 1: Alternatives to Paid Work
Unit 2: Working as a Volunteer	Unit 2: Working as a Volunteer	

### Essential resources

Learners will need the opportunity to undertake a brief period of voluntary work.

### Websites

[www.direct.gov.uk/en/YoungPeople/Workandcareers/Workexperienceandvolunteering/DG\\_066181](http://www.direct.gov.uk/en/YoungPeople/Workandcareers/Workexperienceandvolunteering/DG_066181)

[www.voluntaryworker.co.uk](http://www.voluntaryworker.co.uk)

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

[www.wfac.org.uk/?Information:Working\\_in\\_the\\_Voluntary\\_Sector#what](http://www.wfac.org.uk/?Information:Working_in_the_Voluntary_Sector#what)



## Unit 3: Managing Your Own Money

QCF Level: Level 2

Credit value: 2

Guided learning hours: 20

---

### Unit abstract

Being able to manage your own finances is an essential life skill for any learner and is a key factor in avoiding stress and difficulties caused by money matters. The aim of this unit is to help the learner develop the skills and knowledge to produce a budget successfully, so that their planned outgoings do not exceed their income. The unit also considers buying on credit and the responsibilities and potential problems associated with using credit and loans.

### Learning outcomes and assessment criteria

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

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Be able to produce a budget	1.1 Carry out suitable calculations to plan outgoings and income
2 Know ways to buy and invest on credit	2.1 Identify different sources of credit
3 Understand the responsibilities of using credit for outgoings and investing	3.1 Describe the responsibilities of using credit for outgoings and investing
4 Understand the potential problems of using credit	4.1 Describe the potential problems of using credit

## Unit content

---

### 1 Be able to produce a budget

*Carry out suitable calculations to plan outgoings and income:*

*Outgoings:* eg gas/electricity, mortgage/rent, mobile/landline phone, council tax, income tax and national insurance, water rates, pension scheme payments, groceries, clothing, entertainment, transport, childcare costs, credit card repayment

*Sources of income:* salary or wages; inheritance, gifts; pocket money; selling items; benefits; loans and credit agreements; interest on savings

*Suitable calculations:* daily/weekly/monthly expenditure of essential and non-essential outgoings; weekly/monthly income

*Planning outgoings and income:* knowing how much money you have available each week/month after taxes; knowing how much you can afford to spend on various items, goods or services

### 2 Know ways to buy and invest on credit

*Identify different sources of credit:* loans, credit cards, store cards, in-store finance deals

### 3 Understand the responsibilities of using credit for outgoings and investing

*Responsibilities of using credit:* state your personal financial details accurately and honestly when applying for credit or increased level of credit, know how much money you can afford to borrow, don't take out more credit than you can afford to repay, check the interest rate (APR) before signing a credit agreement eg for a loan, credit card, store card, minimum repayments to the lender must be made on time, check the details of credit statements and check with the lender if any of the details are unclear or incorrect, inform the lender if you get into difficulty with your repayments

### 4 Understand the potential problems of using credit

*Potential problems of using credit:* interest rates could cause total repayment amount to greatly exceed the amount of money borrowed, penalty fees could apply if the borrowed amount is repaid in full before end of credit agreement, levels of debt could become unmanageable, inappropriate levels of debt could have negative consequences eg legal action, emotional stress, goods repossessed

## Essential guidance for tutors

---

### Delivery

The unit has been designed to make the key topics practically-based wherever possible. Learners should, therefore, be actively involved throughout the delivery of this unit. Information may be gained from their own experiences, the internet, banks, building societies and other appropriate sources. Learners need to be introduced to the basic terminology needed for preparing a budget, using credit and the factors associated with preparing a budget and using credit, for example outgoings, expenditure, income, repayments, interest, debt.

As a way of introducing the unit, small group discussions could identify different sources of income and common types of weekly or monthly outgoings. Learners would then progress to planning outgoings and income in the form of a basic budget plan.

For learning outcome 1, learners must be able to demonstrate a range of basic calculation techniques. The level of calculations required should reflect the functional skills mathematics standards for learners at this level. This may be approached through a role-play exercise or other suitable scenario that will entail the learner keeping a record of income and expenditure for a week/month, and using those records to plan the weekly/monthly outgoings according to the income. If the learner chooses to use their own financial situation as a basis for planning income and outgoings, confidentiality must be respected throughout.

A number of websites provide budget planners which the learner can complete for example [www.moneymadeclear.fsa.gov.uk](http://www.moneymadeclear.fsa.gov.uk). Initially, learners may carry out an internet search to find the most appropriate budget planner to meet their needs. Some budget planners will do the calculations for the learner. However, for assessment purposes, the learner must be able to do the calculations themselves, with or without a calculator.

Alternatively, small group discussions could be used to work out potential outgoings and a rough estimate of what each outgoing costs per week/month. Where small group discussions are used to work out income and expenditure for a budget, it is advisable, in the interests of learner confidentiality, to use simulated examples of a family or individual situation as far as possible.

Learning outcome 2 is based on identifying different sources of credit. Learners should be encouraged to use the internet or visit local banks, building societies and shops to gather information about different forms of credit. The information gathered, by individual learners or small groups of learners, could be presented to the whole group. Alternatively, representatives from banks or building societies could be invited to speak to the group about the various credit services their organisations offer.

Learning outcomes 3 and 4 present credit and loans as areas that are important to learn about and understand in today's society. It is especially important for the learner to gain an appropriate understanding of the requirements and responsibilities associated with buying on credit and taking out loans.

Debt is on the increase in the UK and helping learners understand the consequences of getting into debt, and other potential problems associated with credit, is an important element of this unit. Younger learners may feel that they cannot experience some of the problems associated with using credit or get into debt, as they cannot apply for credit cards, overdrafts, personal loans or hire purchase schemes. However, discussions could centre on the consequences of getting into debt by other means, such as incurring debts with family and friends. Adult learners may have already experienced some of the problems associated with using credit. This subject area could be particularly sensitive and should be handled with great care.

### Assessment

To meet 1.1, the learner must draw up a simple budget in the form of outgoings planned against income for a given period of time. The learner may either be given simulated information on which to base their calculations or may base their calculations on their own circumstances. An income should also be provided. This could be based on the national minimum wage. Where the calculations are based on the learner's own circumstances, confidentiality must be respected throughout. The level of calculations required should reflect the appropriate functional skills mathematics standards for learners working at this level.

In order to achieve 2.1, the learner must identify at least two different examples of sources of credit.

For 3.1, the learner must describe at least three different responsibilities that the borrower has when using credit for outgoing expenses or investment purposes. The learner must be able to provide appropriate details about each of the responsibilities; it is not enough for the learner merely to identify them. As evidence, the learner may take on the role of a lender who provides guidance on what the borrower's responsibilities are. Alternatively, the learner may gather information on the topic and present this to the group.

To achieve 4.1, the learner must be able to describe at least two potential problems of using credit. The information could be presented as a poster, table or leaflet. The learner must be able to identify the potential problem and, in each case, give a straightforward reason or explanation of why it is a potential problem.

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

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

Entry Level	Level 1	Level 2
Unit 3: Managing Your Own Money	Unit 3: Managing Your Own Money	
Unit 4: Being Responsible for Other People's Money	Unit 4: Handling Other People's Money	

## Essential resources

Learners will need access to information relating to banks, building societies and other financial institutions.

### Websites

[www.bbc.co.uk/skillswise/numbers/measuring/money/factsheet.shtml](http://www.bbc.co.uk/skillswise/numbers/measuring/money/factsheet.shtml)

[www.cccs.co.uk](http://www.cccs.co.uk)

[www.direct.gov.uk/en/YoungPeople/Money/index.htm](http://www.direct.gov.uk/en/YoungPeople/Money/index.htm)

[www.moneymadeclear.fsa.gov.uk/tools/budget\\_calculator.html](http://www.moneymadeclear.fsa.gov.uk/tools/budget_calculator.html)

[www.need2know.co.uk/money](http://www.need2know.co.uk/money)



## Unit 4: Searching for a Job

QCF Level: Level 2

Credit value: 1

Guided learning hours: 10

---

### Unit abstract

This unit aims to assist learners in developing an understanding of a wide range of potential sources of employment, so that they can find out which sources of employment would best suit their individual needs. Learners will develop the skills needed to link their own skills, interests and achievements to appropriate job sources and job roles. They will also gain experience of communicating with an employer, or the employer's representative, to gain further information about a suitable job vacancy.

### Learning outcomes and assessment criteria

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

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Understand how to use potential job sources	1.1 Evaluate a range of sources of employment available for job-seekers 1.2 Select appropriate sources of job vacancies for their own purposes 1.3 Identify potential job roles from the appropriate sources of employment
2 Understand how their skills, interests and achievements might relate to potential job roles	2.1 Explain how their skills, interests and achievements relate to potential job roles identified from appropriate sources of employment
3 Be able to investigate job vacancies	3.1 Search for potential job vacancies 3.2 Communicate with employers or the employer's representative to obtain further information about job vacancies

## Unit content

---

### 1 Understand how to use potential job sources

*Sources of employment:* sources that provide a personalised service to job seekers or employers eg employment agencies, Jobcentres; sources that provide basic information about job opportunities eg magazines, newspapers, public noticeboards, journals and other publications; other types of sources eg word of mouth; different types of employment eg private sector, voluntary sector, public sector, self-employment

*Appropriateness of job vacancy sources:* the choice of source could limit or widen the type and number of job vacancies searched for eg using the internet versus using a local job noticeboard; some sources of potential employment are specialised or specific to particular job types eg industry publications, trade journals, specialised recruitment agencies for office staff or medical staff only; differences between employment conditions in different sectors eg working conditions, salary and benefits, terms of employment, ethics and values of the organisation

### 2 Understand how their skills, interests and achievements might relate to potential job roles

*Relating skills, interests and achievements to potential job roles:* understanding how own skills, interests and achievements could be used in specific jobs; evaluating the specific 'hard skills' and 'soft skills' requirements of certain job roles against own skills, interests and achievements; knowing why some job roles might be unsuitable; the job role might be an appropriate match even though not all the learner's current skills and interests are reflected in the job role, some skills or qualifications which the learner does not currently have, could be acquired via the potential job role

### 3 Be able to investigate job vacancies

*Searching for job vacancies:* identifying the most appropriate sources to search for employment based on own skills, interests and achievements; using specific job-searching tools eg searching employment sites on the internet, contacting employers directly, registering with a Jobcentre, reading local community noticeboards; using contact details or instructions in the job advert to apply for the job or find out further information about the job

*Communicating with employers or the employer's representative:* finding out more information about a job from the employer or the person who placed the advertisement (eg Jobcentre or employment agency); identifying the appropriate questions to ask in order to find out the desired information; using appropriate means of communication to find out more information eg fax, phone, email; knowing how to respond to the information received from the employer/employer's representative

## Essential guidance for tutors

---

### Delivery

The emphasis of this unit is on allowing the learner to develop the skills needed to search for a job which links to their own skills, interests and achievements. Learners will be undertaking independent research during the majority of this unit supported by one-to-one tutorials.

Learners should be encouraged to complete a log of their research to help them in meeting the requirements of the assessment criteria.

For learning outcome 1, learners could work in small groups to research different sources of employment and report their findings to the group. The value of each source could be discussed as a group. Learners could undertake their own research into a range of job sources available to them. These may include job agencies such as Jobcentres, employment agencies or newspapers, the internet or trade journals. Learners may also choose to investigate non-advertised jobs through talking to colleagues, relatives or friends.

For learning outcome 2, learners could undertake a personal audit to identify their skills, interests and achievements to help them to identify a range of potential job roles which they think would be suitable for them. At this level, learners may have already gained qualifications or work experience which will be relevant to their job search. They should be encouraged to review this along with their other skills and interests.

Learners at this level would be expected to show independence in undertaking their own investigation into a range of job roles for learning outcome 3. However, tutors could support learners by discussing the process with them and providing information when asked. In searching for jobs, learners should be advised to use jobs for which they will apply or in which they have a genuine interest.

Once the learner has identified potential job roles, the suitability of the identified job roles should be discussed and agreed with the tutor.

Learners could be encouraged to find out as much information as possible about their chosen job vacancies. Any communication with employers can be discussed and agreed with the tutor, for example a draft email or relevant questions to ask on the phone. In simulated exercises, learners may draft a suitable email but not send it, and discuss their questions with someone who isn't their tutor.

### Assessment

Assessment for this unit may be presented in the form of a log recording the individual research completed by the learner and including evidence of class discussions, one-to-one tutorials, and communication with employers. Alternative methods of evidencing may be used.

To achieve 1.1, the learner will need to consider three sources of employment and, for each source, describe the advantages and disadvantages to potential jobseekers.

The learner will need to identify two appropriate sources of information for their own purposes for 1.2.

From the sources identified for 1.2, the learner will need to state two potential job roles to meet 1.3.

For 2.1, the learner must explain how their own skills, interests and achievements are linked to the two potential job roles identified in 1.3, for example why they felt that some roles were suitable (for example it matched their skills, was in a good geographical location) or unsuitable (for example too far away, hours or salary not right, too much travel required for the job role).

To meet 3.1, the learner must be able to narrow down the search for job vacancies, based on the information they have collected about themselves and their personal requirements. The learner needs to include evidence of their search for potential job vacancies. This may include printouts of web-based research, copies of job advertisements, evidence of interviews with employment agencies, Connexions, a careers adviser or Jobcentre.

For 3.2, the learner needs to include evidence of contact made with employers (either by telephone, letter or email) to request further information about job vacancies, for example requesting an application pack or form, or, in cases where a relevant contact is given, to have an informal conversation about the job role. If contact is made with the employer via the telephone, evidence of this should be recorded by the tutor (or recorded by the learner with verifying notes from the tutor).

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

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

Entry Level	Level 1	Level 2
Unit 5: Searching for a Job	Unit 5: Searching for a Job	Unit 5: Applying for a Job
Unit 6: Applying for a Job	Unit 6: Applying for a Job	Unit 6: Preparing for an Interview
Unit 7: Preparing for an Interview	Unit 7: Preparing for an Interview	Unit 7: Interview Skills
Unit 8: Interview Skills	Unit 8: Interview Skills	Unit 10: Career Progression
Unit 11: Career Progression	Unit 11: Career Progression	

## **Essential resources**

Learners will need access to sources of information about potential employment (such as magazines, newspapers, the internet, other people, Jobcentres) as well as access to specific information about how to contact employers to request further information about a job vacancy.

### **Websites**

[www.connexions.gov.uk](http://www.connexions.gov.uk)

[www.direct.gov.uk/en/Employment](http://www.direct.gov.uk/en/Employment)

[www.jobcentreplus.gov.uk](http://www.jobcentreplus.gov.uk)

[www.jobsite.co.uk/articles](http://www.jobsite.co.uk/articles)

[www.learndirect.co.uk](http://www.learndirect.co.uk)

[www.monster.co.uk](http://www.monster.co.uk)

[www.support4learning.org.uk/careers/career\\_planning\\_information.cfm](http://www.support4learning.org.uk/careers/career_planning_information.cfm)



## Unit 5: Applying for a Job

QCF Level: Level 2

Credit value: 1

Guided learning hours: 10

---

### Unit abstract

In a competitive job market, it is vital that learners understand the job application process and know how to prepare an application that meets the requirements of a prospective employer. This unit aims to equip learners with the skills to access and respond to different types of job application opportunities independently. Learners will gain an understanding of how to present a job application in an appropriate way, including collating relevant information and using suitable conventions and formatting. Learners will also evaluate the suitability of information included in a job application and the method of presentation.

### Learning outcomes and assessment criteria

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

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Be able to access different methods of applying for a job	1.1 Investigate different methods of applying for a job
2 Be able to prepare a job application	2.1 Collate the appropriate information for a job application 2.2 Prepare a thorough job application
3 Be able to present the job application appropriately	3.1 Select and use the conventions, formats and styles of presenting job applications appropriately
4 Be able to reflect on the appropriateness of the job application	4.1 Evaluate the suitability of the style and information in the job application in relation to its intended audience

## Unit content

---

### 1 Be able to access different methods of applying for a job

*Different methods of applying:* various methods eg application forms, CVs, covering letters, online applications, telephone enquiries, applying in person; how and where to find job application information eg from human resources departments, company/organisation websites, job websites, local and national media, employment agencies

### 2 Be able to prepare a job application

*Prepare job application:* selecting relevant and appropriate information to include in the job application eg include reference from voluntary work at animal shelter to support application for work at a veterinary clinic, refer to achievements at local sports club in covering letter for work at a gym

*Prepare thorough job application:* paying attention to all details of the job application so that nothing relevant is left out; ordering different types of information in a logical manner in the application document, checking whether or not to include supporting documents eg work permits, certificates, personal identification; using personal statements to create positive impression of skills and interests

### 3 Be able to present the job application appropriately

*Use appropriate conventions, formats and styles:* eg accurate and neat presentation, using tools that aid accurate and appropriate presentation eg CV templates, covering letter templates, spellchecker, jobseeker advice websites or magazines, understanding and using the appropriate level of language for a CV, personal statement or covering letter

### 4 Be able to reflect on the appropriateness of the job application

*Suitability of the application for intended audience:* eg evaluating the CV for clarity and relevance of content, checking whether the application provides all the information the employer requires, evaluating the CV for accuracy of language, eg whether the language used in the application is clear, concise and at a level appropriate for a job application, seeking feedback from others regarding the appropriateness of the content and format of the job application

## Essential guidance for tutors

---

### Delivery

The unit has been designed to make the key topics practically based wherever possible. Aspects of this unit include learners investigating and completing a job application with only general guidance from the tutor.

For learning outcome 1, learners could work in groups to investigate different methods of applying for jobs, what types of employers use which types of application method and what employers might be looking for in job applications. Learners could create a handout, with examples, which would work as a factsheet or guidance notes for other learners to follow.

Learning outcome 2 requires a mixture of tutor- led input and individual learner research. Learners could conduct research into a suitable job vacancy and use the application required for that job or use a simulated application which reflects the learner's interests and relevant experience. The importance of including relevant information in a job application could be explored in tutor-led discussions.

For learning outcome 3, examples of CVs, covering letters and job applications that have been completed incorrectly, could be analysed by learners in groups to point out errors or areas needing improvement. Learners could discuss the importance of accurate and neat presentation, including relevant information and its effect on a successful outcome to the job application. Guest speakers from the world of work or employment agencies could be invited to speak to learners about the importance of presenting information on applications forms, CVs and covering letters appropriately and following specific instructions.

Learners could develop a 'best practice' guidance sheet in presenting job applications. Key points could be collated on a board or flipchart. CV templates and covering letter templates could be provided by the tutor for learners' use.

Learners need to work towards reflecting on the appropriateness of their job application for learning outcome 4. Learners could undertake peer assessment of completed job applications to consider the effectiveness of the application for its intended audience.

### Assessment

To meet 1.1, the learner must provide information about four different methods of applying for a job, including details about when and why each method may be appropriate.

For 2.1, the learner needs to provide evidence of how they decided which information was relevant and appropriate to be included in the job application. This may be in the form of brief notes for example 'I included my experience as baby sitter in my covering letter as it is relevant to the job description which asks for experience in working with children'.

To achieve 2.2, the learner must prepare an appropriate job application (this could be real or simulated) for a potential job role. They must enter the correct information into a CV or job application form and show they can draft an appropriate personal statement or covering letter. The covering letter or personal statement does not have to be lengthy.

To meet 3.1, the job application completed for 2.2 needs to demonstrate the appropriate conventions, styles and formats. If a CV was used in 2.2, the learner should show for 3.1 that the CV is appropriate in terms of style and format for the particular job application; likewise the covering letter or personal statement must reflect the appropriate convention, style and format. The application must be presented in a way that suits its intended audience: the employer. Via their job application, the learner must show that they know how to write to an unknown person in a formal situation and convey their information accurately, concisely and appropriately. The learner also needs to use the correct terminology, spelling, grammar and vocabulary.

To achieve 4.1, the learner needs to provide a basic analysis of the effectiveness of their job application and suggest ways to improve it. Tutors may wish to use a person unfamiliar to the learner to review the job application with the learner if this is a simulated situation.

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

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

Entry Level	Level 1	Level 2
Unit 5: Searching for a Job	Unit 5: Searching for a Job	Unit 4: Searching for a Job
Unit 6: Applying for a Job	Unit 6: Applying for a Job	Unit 6: Preparing for an Interview
Unit 7: Preparing for an Interview	Unit 7: Preparing for an Interview	Unit 7: Interview Skills
Unit 8: Interview Skills	Unit 8: Interview Skills	Unit 10: Career Progression
	Unit 11: Career Progression	

### Essential resources

Learners will need access to sources of information about different ways to apply for a job, including information about job application documents such as CVs, personal statements and covering letters.

## Websites

[www.direct.gov.uk/en/Employment/Jobseekers/LookingForWork](http://www.direct.gov.uk/en/Employment/Jobseekers/LookingForWork)

[www.direct.gov.uk/en/YoungPeople/Workandcareers/Gettingyourfirstjob](http://www.direct.gov.uk/en/YoungPeople/Workandcareers/Gettingyourfirstjob)

[www.hull.ac.uk/careers/students-and-graduates](http://www.hull.ac.uk/careers/students-and-graduates)

[www.open.ac.uk/careers/applying-for-jobs.php](http://www.open.ac.uk/careers/applying-for-jobs.php)

[www.worksmart.org.uk/career/job\\_advertisements](http://www.worksmart.org.uk/career/job_advertisements)



## Unit 6: Preparing for an Interview

QCF Level: Level 2

Credit value: 1

Guided learning hours: 10

---

### Unit abstract

This unit will help learners to develop the skills needed to plan for a successful interview. The unit focuses on the role of the learner in correctly anticipating and preparing key information, questions and answers for a potential interview.

### Learning outcomes and assessment criteria

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

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Be able to anticipate key questions that they might be asked at the interview	1.1 Suggest key types of questions that the interviewer might ask
2 Be able to prepare answers to anticipated interview questions	2.1 Prepare appropriate answers to the key questions most likely to be asked by the interviewer
3 Know how to use information about the job/placement/course to identify questions to ask the interviewer	3.1 Find out key information about the employer/organisation/course and explain why it is useful for the interview 3.2 Identify what information they do not have about the job/placement/course which they could request at the interview

## Unit content

---

### 1 Be able to anticipate key questions that they might be asked at the interview

*Key questions:* different types of interview questions eg questions about the learner's experience, goals, skills, qualities, suitability for the job/placement/course, why the learner is interested in the course/job/placement, about something specific in the learner's CV, about the learner's knowledge of the course/placement/job for which they are being interviewed

### 2 Be able to prepare answers to anticipated interview questions

*Prepare appropriate answers:* formulating answers and reviewing the content for accuracy; relevance and appropriateness to the anticipated questions; appropriateness of language level

*Anticipated interview questions:* deciding which questions are most likely to be asked by the interviewer based on an understanding of the course/placement/job being applied for eg interview for job at a call centre likely to include questions about people skills and telephone manner, interview for an IT course likely to include questions about qualifications or experience in ICT, maths or technical areas; understanding that not all questions can be predicted

### 3 Know how to use information about the job/course/placement to identify questions to ask the interviewer

*Key information about employer/organisation/course:* entry requirements for training course, length of the course, tasks and responsibilities of the job role, qualities and experience needed for the job, what business the company does, what the goals of the organisation are

*Use information to identify questions:* identifying information about the job/placement/course which they could not find in advance of the interview and could therefore, request from the interviewer eg course materials needed, promotion and training opportunities offered by the organisation, working hours for the placement

## Essential guidance for tutors

---

### Delivery

During delivery of this unit, learners should be given as much practical experience as possible. Delivery methods could include learner-centred tasks such as group work and research tasks, and learner-led presentations.

By combining various aspects of the unit, tutors/line managers should be able to cover all the learning outcomes through practical activities.

The tutor could start delivery of this unit by discussing the purpose of interviews. Similarly, a line manager could discuss with learners (individually or in a group) the purpose of interviews. An understanding of key interview questions could be explored through the use of case studies which provide 'real' interview situations. Learners could work in small groups to explore questions that may be asked, prepare answers and report back to the rest of the group. Learners could be encouraged to use the job description and person specification as a starting point, where appropriate.

Guest speakers may be invited to speak about questions that they ask in different interview situations and the answers they expect. Having learnt the basics, learners should have the opportunity to practise their skills with one other, using role-play. They can then analyse the role-play activities and agree good practice for interviews.

Learners could work in groups to research key information about different employers, organisations or courses related to a specific interview situation using websites, libraries, magazines or other publications. Learners could prepare questions to ask the interviewer and create guidelines which work as a factsheet for other learners to follow.

The interview being prepared for may be for a job, placement or place on a training course. It could be a real situation but a simulated interview is equally acceptable. Whether real or simulated, every effort should be made to provide an interview opportunity that relates directly to the learner's current or intended work or training interests.

### Assessment

For 1.1, the learner needs to suggest at least three different types of key interview questions which they could be asked by the interviewer, for example questions about their past experience and skills, questions about why they are interested in the placement or training opportunity, questions about why they want the job, questions about future plans, career goals, hobbies or interests. The tutor may support the learner in thinking about and discussing different types of interview questions, but the three types of questions should be independently selected by the learner.

To achieve 2.1, the learner needs to identify four specific questions they think are most likely to come up at the interview. The questions must be relevant to the stated purpose of the interview. The learner must also be able to give a clear example of an appropriate answer to each of the four questions.

For 3.1, the learner needs to provide key information related to a stated interview, for example what the company or organisation does and what the job role comprises or, for a course, the length of the course, details of any accreditation and any entry requirements. To meet 3.1, the learner must also give a brief but clear explanation about why the information they have found is relevant for their interview, preparation or explain briefly how it will assist them in the interview situation itself.

For 3.2, the learner needs to suggest four relevant questions that they could ask the interviewer about the job, placement or course. The four questions should relate to information that the learner has not already obtained in advance of the interview, for example information about working hours, pay, benefits, training and promotion opportunities, travel requirements, course materials needed.

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

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

Entry Level	Level 1	Level 2
Unit 5: Searching for a Job	Unit 5: Searching for a Job	Unit 4: Searching for a Job
Unit 6: Applying for a Job	Unit 6: Applying for a Job	Unit 5: Applying for a Job
Unit 7: Preparing for an Interview	Unit 7: Preparing for an Interview	Unit 7: Interview Skills
Unit 8: Interview Skills	Unit 8: Interview Skills	Unit 10: Career Progression
Unit 11: Career Progression	Unit 11: Career Progression	

### Essential resources

In order to prepare for an interview, the learner will need a given brief for an appropriate job, placement or place on a training course. They will also require access to sources of additional information about the proposed employer/educational organisation.

### Websites

[www.direct.gov.uk/en/Employment/Jobseekers/LookingForWork](http://www.direct.gov.uk/en/Employment/Jobseekers/LookingForWork)

[www.direct.gov.uk/en/YoungPeople/Workandcareers/Gettingyourfirstjob](http://www.direct.gov.uk/en/YoungPeople/Workandcareers/Gettingyourfirstjob)

[www.jobcentreplus.gov.uk](http://www.jobcentreplus.gov.uk)

[www.open.ac.uk/careers/preparing-for-an-interview.php](http://www.open.ac.uk/careers/preparing-for-an-interview.php)

## Unit 7: Interview Skills

QCF Level: Level 2

Credit value: 1

Guided learning hours: 10

---

### Unit abstract

This unit will help learners to develop the skills to undertake an interview, covering both the obvious and less obvious factors in achieving a successful interview. The focus is for the learner to develop a thoroughness of approach to their conduct and interaction with the interviewer, irrespective of the specific interview context. Learners will also be equipped with skills needed to evaluate their performance after an interview, understanding how to use the experience of one interview to prepare constructively for another.

### Learning outcomes and assessment criteria

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

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Be able to present themselves appropriately at an interview	1.1 Arrive in good time for the interview and have prepared information about the name or job role/title of the interviewer 1.2 Introduce themselves at the interview location 1.3 Use appropriate means of non-verbal communication such as body language, facial expressions and tone of voice to show interest in the job or course
2 Be able to answer the interviewer's questions appropriately	2.1 Explain the importance of clarifying an interviewer's questions if they are unclear 2.2 Give full responses which provide answers to the questions asked by the interviewer
3 Reflect on their performance in an interview	3.1 Analyse what went well and what did not 3.2 Suggest ways of improving their performance in a future interview

## Unit content

---

### 1 Be able to present themselves appropriately at an interview

*Arrive in good time and have prepared information about interviewer:* the importance of time-keeping in creating the correct impression at an interview; having basic but accurate details about the name/job role/title of the interviewer on hand in case of need

*Polite, appropriate way to introduce yourself in an interview situation:* use appropriate language and facial expressions, be aware of potential cultural differences around introductions

*Appropriate non-verbal communication:* the importance of body language, facial expressions and volume/tone of voice in creating the correct impression at an interview; showing that you are interested in what is being said by the interviewer

### 2 Be able to answer the interviewer's questions appropriately

*Clarifying an interviewer's questions if they are unclear:* asking politely for unclear questions to be repeated or politely querying unclear questions, eg 'I'm not sure what you mean', 'I don't understand'

*Full responses which provide answers to interviewer's questions:* thinking about whether the answer is relevant to the question before giving the answer; not including irrelevant information in the answer; giving a full answer by providing all the information asked for, understanding that some questions require more detailed responses than others

### 3 Reflect on their performance in an interview

*What went well and what did not:* what went well eg paid attention to all interview questions, was able to answer all questions; what did not go so well eg forgot to ask about materials required for the training course, included irrelevant information in some of the answers

*Suggest ways of improving performance in future interviews:* learning from a past interview experience to improve performance at a future interview eg arrive at interview a bit earlier in future to eliminate feelings of being rushed and anxious

## Essential guidance for tutors

---

### Delivery

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

In order to achieve the learning outcomes for this unit, it would be helpful for learners to gain an understanding of the different types and purposes of interviews. A question and answer session could determine this. Learners could also offer examples of their own interview experiences.

In order for learners to understand the importance of verbal and non-verbal communication in an interview situation, it would be useful for them to watch a video of an interview situation. In groups, learners could discuss and analyse the importance of communication skills and then report back to the rest of the group.

Learners should also have the opportunity to explore cultural differences in non-verbal communication which would be relevant in an interview. Where different cultures and nationalities are represented in the group or learners have experience of other cultures, learners could contribute ideas based on their own experience. Examples could include cultural differences about whether or not to make eye contact with a senior or older person or whether or not to shake someone's hand at the beginning or end of an interview.

Learners could work in small group to prepare interview questions for different interview situations and then take part in role-play to practise their skills on each other.

For learning outcome 3, learners could work in groups to devise a checklist to use to help them to analyse their performance in an interview. Tutors/line managers could support learners in discussing why some things went well in the interview and why others did not go so well, the role of feedback and the importance of applying it, and dealing with emotions such as stress and nervousness during an interview.

The interview may be for a job, placement or place on a training course. It could be a real situation but a simulated interview is equally acceptable.

### Assessment

The learner must have identified in advance where the interview will be held and what route and means of transport they will need to take in order to arrive in time to collect themselves before the interview. To achieve 1.1, they must have found out and recorded information about the name, job title or role of the person who will be interviewing them, and have this information to hand upon arrival for the interview. For 1.2, the learner needs to introduce themselves to the interviewer, either initiating the introductions or in response to the interviewer introducing themselves first.

The learner must be dressed appropriately for the interview context. The definition of 'appropriately' will differ from one workplace or course to another, depending on the nature of the job/placement/course applied for. The learner's appearance needs to be consistent with that normally expected of interviewees in the particular setting. Regardless of setting, the learner should have paid attention to their personal hygiene and be wearing clean clothes.

For 1.3, appropriate body language may include positive facial expressions or tone of voice, shaking hands (if appropriate), sitting once invited to do so, sitting up straight and listening actively. The tutor/line manager should assess the appropriateness of the learner's non-verbal communication in the light of any relevant cultural factors.

The interviewer should ask questions clearly, introducing some fairly complex ideas or situations for the learner to consider, such as asking the learner how they would respond to a particular scenario. The interview should last for around 15 minutes and be conducted by an adult who (if in a college or school context) is not the learner's usual tutor. It would be helpful, though not a requirement, if the interviewer was unfamiliar to the learner.

During the interview, the learner must listen carefully so that they can answer the questions asked (rather than those they would have liked to have been asked or have prepared answers for).

To achieve 2.1, the learner must demonstrate the ability to clarify the interviewer's questions by querying or asking for a question to be repeated during the interview. Alternatively, if no unclear questions arise during the interview, the learner must explain the general importance of clarifying interview questions during their post-interview reflection.

To achieve 2.2, the learner needs to communicate clearly and give answers of reasonable length, avoiding both single word answers and rambling. They should try to paint a positive picture of themselves through their answers.

Evidence to support observation of the learner's performance in the interview could be a written statement by the tutor/line manager/interviewer or could be a video with supporting commentary from the tutor/line manager.

For 3.1, the learner must identify at least two aspects of their performance that went well (for example arriving promptly, wearing the right clothes, being confident enough to ask for a question to be repeated) and one that did not go so well (for example talking too much during the interview, forgetting the interviewer's name, slouching). They must also be able to pick out which questions were answered well and which were not. They may reflect on the interview by watching it back on video or listening to it on a recording, discussing it with the interviewer or other observers. Following these reflections, the learner must record their self-evaluation independently. This could either be written, for example through written statements from the learner on the review of their performance and/or supporting statements from the tutor, line manager or other person involved in the discussion and review, or through video or taped discussion.

To achieve 3.2, the learner needs the opportunity to discuss, with a line manager, tutor or other appropriate person, how they might handle some aspects of the interview differently in future. They may seek the advice of others, but need to identify and record any areas and strategies for improvement independently. The learner must be able to suggest at least one way that they could improve their performance at a future interview.

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

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

Entry Level	Level 1	Level 2
Unit 5: Searching for a Job	Unit 5: Searching for a Job	Unit 4: Searching for a Job
Unit 6: Applying for a Job	Unit 6: Applying for a Job	Unit 5: Applying for a Job
Unit 7: Preparing for an Interview	Unit 7: Preparing for an Interview	Unit 6: Preparing for an Interview
Unit 8: Interview Skills	Unit 8: Interview Skills	Unit 10: Career Progression
Unit 11: Career Progression	Unit 11: Career Progression	

### Essential resources

Learners need the opportunity to participate in a real-life or simulated interview.

### Websites

[www.direct.gov.uk/en/Employment/Jobseekers/LookingForWork](http://www.direct.gov.uk/en/Employment/Jobseekers/LookingForWork)

[www.direct.gov.uk/en/YoungPeople/Workandcareers/Workexperienceandvolunteering/DG\\_066181](http://www.direct.gov.uk/en/YoungPeople/Workandcareers/Workexperienceandvolunteering/DG_066181)

[www.jobcentreplus.gov.uk/jcp/Customers/outofworkhelplookingforwork/Getting\\_job\\_ready/Interviews](http://www.jobcentreplus.gov.uk/jcp/Customers/outofworkhelplookingforwork/Getting_job_ready/Interviews)

[www.open.ac.uk/careers/interviews.php](http://www.open.ac.uk/careers/interviews.php)

[www.worksmart.org.uk/career/interviews](http://www.worksmart.org.uk/career/interviews)



## Unit 8: Self-management Skills

QCF Level: Level 2

Credit value: 2

Guided learning hours: 20

---

### Unit abstract

A proactive approach to self-management is a vital aspect of employability. Employees need to be able to manage themselves appropriately in order to stay safe, healthy and to make a constructive contribution to the workplace.

This unit will equip learners with an understanding of why self-management in the workplace is important and how effective self-management benefits themselves, their colleagues and their employer. Learners are asked to demonstrate a range of self-management skills throughout the working day and carry out an evaluation of their performance, suggesting any areas for improvement.

### Learning outcomes and assessment criteria

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

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Understand the importance of managing themselves effectively in the workplace	1.1 Explain how and why they need to manage themselves in the workplace 1.2 Explain how appropriate self-management benefits themselves, their colleagues and their employer
2 Demonstrate effective self-management skills	2.1 Produce a plan for a working day 2.2 Structure appropriate breaks during their working day 2.3 Agree and prioritise work appropriately to achieve their daily objectives
3 Carry out an analysis of their self-management skills	3.1 Analyse their self-management skills 3.2 Suggest areas for improvement

## Unit content

---

### 1 Understand the importance of managing themselves effectively in the workplace

*Importance of managing themselves:* contributing to own health and wellbeing, builds self-esteem and confidence, builds better working relationships with peers and other colleagues, appreciated more by others, can perform work more comfortably and easily

*How to manage themselves effectively in the workplace:* eg taking care of personal wellbeing eg select healthy meal options in canteen at lunchtime to boost physical health, talk to supervisor or human resources representative if feeling anxious about learning new tasks; follow health and safety guidelines eg take regular breaks from looking at computer screen, use correct method for lifting heavy objects; manage time effectively eg check daily tasks lists every morning for any urgent tasks

*Benefits of effective self-management to others:* for immediate colleagues, other colleagues, the employer eg makes workplace safer, avoids problems related to inappropriate workloads, boosts morale and a positive atmosphere in the workplace, lower rates of absence from work, higher rates of productivity if staff are happy and healthy in their workplace

### 2 Demonstrate effective self-management skills

*Effective self-management skills:* plan for a working day including anticipated tasks, time needed for completion, break times; range of skills needed eg time management, understanding of health and safety, keeping themselves and others safe and healthy

### 3 Carry out an analysis of their self-management skills

*Analysis of performance:* analysis of plan and performance eg was plan carried out, was there a need to change the plan during the working day, did learner feel safe and comfortable in the workplace

*Areas for improvement:* discussion of what went well and what did not go so well; suggest areas for improvement eg will ask for help in future if unable to complete a task within the required deadline.

## Essential guidance for tutors

---

### Delivery

This unit may be delivered in the workplace, in the context of a work placement or volunteering commitment or in a simulated situation in a school or college. It is expected that the self-management skills listed within the unit are those which need to be demonstrated by learners within an educational context as well as by employees. It is likely, therefore, that learners will already be aware of a range of self-management skills in a general context.

Tutors/line managers could use copies of organisational procedures for different types of organisations as appropriate, for example school or college procedures for staff and/or learners relating to self-management (or if in the workplace, copies of procedures for that workplace). Relevant training or developmental courses or exercises relating to self-management (for example time management, 'mock' work tasks and 'in tray exercises', health and safety, personal management) are also useful resources.

Learning outcome 1 could be delivered through group discussion or through discussion between the learner, their line manager, supervisor or another appropriate person familiar to the learner. Tutors/line managers could provide the group or individual learner with prompts and facilitate the discussion to help learners explain how and why it is important to manage themselves in the workplace. Learners should discuss why it is beneficial, to themselves and to others, that they look after themselves in the workplace. Learners could create a poster or leaflet to show their competence in achieving learning outcome 1.

Tutors/line managers may wish to use organisational procedures and health and safety policies as a background to show learners the types of responsibilities employees have to their health and wellbeing, and also the ways in which the workplace can support employees in this.

In preparing a plan for a working day, tutors/line managers may wish to discuss and agree the format of the plan in advance. Tutors/line managers may wish, for example, to provide learners with a template for a plan to fill in, allowing them to record all the essential information.

Learning outcome 2 may be delivered in a variety of ways. If in a work situation, learners could carry out their normal daily activities whilst being observed by their line manager, supervisor or another responsible person. In a simulated situation, learners could be provided with (or agree with their tutor) a scenario which enables them to demonstrate self-management skills within the workplace. However, learners would need an opportunity to demonstrate that they can carry out a range of activities. Tutors/line managers may wish to spend time with learners in preparation for the demonstration, for example carrying out a simulated activity in which the tutor, line manager or other observer provides help or support to the learner by pointing out, for example, health and safety issues that the learner may have missed. They may also discuss and agree the activities which the learner will demonstrate, in advance of the demonstration. Learners must be comfortable with

the expectations of the demonstration and the way in which they will be assessed, for example if it is an observation then they should be comfortable with the presence of an observer who may not necessarily offer advice and support during the assessment.

Learning outcome 3 could be delivered through a one-to-one discussion between the tutor or line manager and the learner. Learners and tutors would discuss how the learner fared in their demonstration and learners would have the opportunity to carry out an analysis of their performance. Tutors/line managers may wish to include this analysis as part of any formal reporting (for example appraisal or review sessions during the year).

## **Assessment**

To achieve 1.1, the learner must be able to explain why it is important that they manage themselves in the workplace and provide at least two examples of how they could manage themselves effectively at work. Evidence to support this can be either in a written format, for example records of group or individual discussion (written by the tutor/line manager or by the learner with sign-off from the tutor) or a video or via audio recording.

For 1.2, the learner must be able to explain at least three benefits of effective self-management to others in the workplace, for example benefits to other colleagues and their employer.

To achieve 2.1, the learner should produce a plan for their working day in advance of their demonstration. The plan can be discussed and agreed with the tutor/line manager and can be prepared to a set template, but the information contained within the plan must be from the learner. The plan must include anticipated tasks for that day. To show the learner's understanding of the daily objectives, the plan will show prioritisation of the tasks and some estimation of the time the learner will need to take to complete these. The plan will also allow for break times appropriate to the workplace situation, for example the learner is likely to be spending long periods of time at a computer and so will need to schedule time when they can move away from the computer and rest their eyes.

For 2.2 and 2.3, the learner should demonstrate self-management skills within the workplace. For 2.2, they must be able to show that they can structure appropriate breaks during their working day. In achieving 2.3, the learner will need to prioritise tasks and activities appropriately to meet their daily objectives, although they may wish to discuss them with their tutor or line manager in advance. The tasks and activities should be agreed before the learner undertakes their work. The learner must be able to show that they can perform these skills and understand what they are doing, although tutors and others may support and prompt them.

The demonstration needs to be observed either by the tutor or another person designated to assess the learner (this could be a line manager or supervisor for example). The observation needs to form the basis of a discussion with the learner after the demonstration of their performance. This observation can take the form of a written statement by the tutor or line manager (which would support good practice for appraisal and review in the workplace) or could be a video with supporting commentary from the tutor or line manager.

To achieve 3.1 and 3.2, the learner needs to carry out an analysis of their performance in which they represent their own views on their performance and record them. It is appropriate for the tutor, line manager or colleague to offer constructive criticism and for the learner to include this feedback in their review of the performance if they wish to do so. However, the learner's self-evaluation should represent their own views on their performance and be recorded independently. The learner needs to discuss what they felt went well, (for example being able to get some extra work done due to rescheduling tasks and activities) and what they felt did not go so well (such as being late for a meeting or missing a phone call). The learner must also be able to discuss with their tutor or line manager what they felt they could improve on.

Evidence to support 3.1 and 3.2 can be either written, for example through written statements from the learner on the review of their performance and/or supporting statements from the tutor, line manager or other person involved in the discussion and review, or through video or taped discussion.

Written statements by the learner do not have to be lengthy and can be discussed and agreed by the tutor/line manager and the learner in advance.

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

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

Entry Level	Level 1	Level 2
Unit 9: Self-management Skills	Unit 9: Self-management Skills	Unit 15: Effectiveness at Work
Unit 12: Conduct At Work	Unit 16: Positive Attitudes and Behaviours at Work	Unit 26: Preparing for Work Placement
Unit 22: Safe Learning in the Workplace	Unit 30: Safe Learning in the Workplace	
Unit 20: Preparing for Work Placement	Unit 28: Preparing for Work Placement	

### **Essential resources**

There are no essential resources for this unit.

### **Websites**

[www.connexions-direct.com](http://www.connexions-direct.com)

[www.direct.gov.uk/en/Employment](http://www.direct.gov.uk/en/Employment)

[www.lifecoachexpert.co.uk](http://www.lifecoachexpert.co.uk)

[www.monster.co.uk](http://www.monster.co.uk)

[www.worksmart.org.uk/career](http://www.worksmart.org.uk/career)



## Unit 9: Self-assessment

QCF Level: Level 2

Credit value: 2

Guided learning hours: 20

---

### Unit abstract

The aim of this unit is for the learner to assess their own strengths, weaknesses, skills and qualities so that they can use this understanding of themselves to make progress in their work and personal lives. Additionally, the learner will use this information to set their own personal goals. Learners will gain an understanding of the importance of self-assessment and will find out how to set their own long-term and short-term personal goals and evaluate personal achievements over time.

### Learning outcomes and assessment criteria

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

Learning outcomes		Assessment criteria	
The learner will:		The learner can:	
1	Understand the importance of self-assessment	1.1	Explain the importance of self-assessment
2	Reflect on personal strengths and weaknesses	2.1	Describe their own personal strengths and weaknesses
		2.2	Explain why it is important to continue developing their strengths
		2.3	Describe why it is important to improve areas of weakness and some ways of doing so
3	Understand why personal skills and qualities are important to all areas of life	3.1	Analyse their own skills and qualities
		3.2	Explain how these skills and qualities are important to their lives
4	Understand the process of personal goal setting	4.1	Describe how short-term goals will meet long term goals
		4.2	Describe ways in which goals may be tracked over time

Learning outcomes	Assessment criteria
The learner will:	The learner can:
5 Be able to evaluate personal achievements	5.1 Identify their achievements over a given period 5.2 Discuss some examples of things they would have liked to achieve 5.3 Suggest some reasons why they achieved some things, but not others

## Unit content

---

### 1 Understand the importance of self-assessment

*Importance of self-assessment:* to identify personal strengths; to identify personal weaknesses; to recognise personal skills; to recognise personal qualities; to plan future; to set achievable goals

### 2 Reflect on personal strengths and weaknesses

*Importance of developing strengths:* may benefit career, may benefit personal life, may improve self-esteem, career plans may be changed, enhanced or confirmed as a result, understanding your strengths helps in setting personal goals

*Importance of improving weaknesses:* helps in setting realistic goals, may benefit personal life, can improve employment or career prospects

### 3 Understand why personal skills and qualities are important to all areas of life

*Analyse own skills and qualities:* use strengths and weaknesses analysis tool, reflect on past performances and achievements, consider talents and interests, receive feedback from appropriate people

*Importance of personal skills and qualities:* making realistic career choices and plans; setting achievable long-and short-term goals; successful relationships at work and in personal life

### 4 Understand the process of personal goal setting

*Goal setting process for short-term goals and long-term goals:* using a stepped process, assess strengths and weaknesses, assess skills and qualities; goal needs to be important to the individual; goal to be achievable; importance of defining the goal clearly; use SMART targets, short-term goals must link logically and progressively to long-term goal

*Tracking goals over time:* periodically check plan of action to be taken; have short-term targets; measure achievement by comparing current and intended performance

### 5 Be able to evaluate personal achievements

*Evaluate personal achievements:* successful achievements and why something was successful eg successful work placement as supervisor was supportive and learner was consistently punctual; less successful achievements and why something was less successful eg coursework not fully completed as learner did not ask for necessary help

## Essential guidance for tutors

---

### Delivery

The emphasis of this unit is on allowing the learner to analyse their own strengths, weaknesses, skills and attributes in order to set their own long-term and short-term goals. For much of the delivery of this unit, learners will need to focus on their own personal attributes in order to develop a personal plan to achieve goals; a mixture of tutor/line manager-led input and individual learner reflection is therefore, required.

Learners at this level will be working towards developing some autonomy in setting goals.

To complete this unit, learners could record their self-analysis, goal setting and evaluations through the completion of logbooks (or similar method of recording the appropriate information). Tutors/line managers are encouraged to use a variety of methods of recording information in the log, wherever possible or appropriate.

The tutor/line manager could start delivery of this unit by inviting guest speakers to talk about their experiences of self-assessment. Learners would find it useful to prepare questions to ask speakers about how self-assessment was of benefit to them in their careers and personal lives. Learners in the workplace might find it useful to ask other colleagues questions regarding self-assessment or use the internet to find information about the experiences of other people.

For learning outcome 2, the strengths and weaknesses of individual learners could be explored through tutorials or one-to-one discussions. Learners could then work on their own to consider why it is important to improve areas of weakness. Learners could conduct personal research using the internet or other appropriate resources for information on some ways of improving areas of weakness. If appropriate, recognised personality profiling and self-assessment tools may be used in a strengths and weakness analysis. The results of the research could be shared with the group or line manager. Recognising and investigating areas of weakness is a potentially sensitive area and should be approached with the appropriate degree of sensitivity and respect, with an emphasis on the fact that everyone has strengths and weaknesses and that it is important to continue developing and accentuating the positive whilst finding ways to address weaknesses and achieve self-improvement in the desired areas.

The importance of skills and qualities for all areas of life could be explored through different case studies for learning outcome 3. A question and answer session could be a useful way of determining the key points.

In order for learners to understand the concept of goal setting for learning outcome 4, it would be useful to develop a mind map or similar learning tool with learners, using prompts and question and answer sessions for each of the factors involved in goal setting, until a picture is complete.

The importance of evaluating personal achievements could be explored through group discussion to include the value of reflecting on failures as well as successes.

## Assessment

Evidence for all the assessment criteria could be provided in the form of a logbook. The logbook could include a variety of methods of recording the appropriate information, depending on the needs of individual learners. Alternative methods of evidencing learning may be used. Evidence from tutorials or taped discussions verified by the tutor/line manager may be included in the log.

For 1.1, the learner will need to give two reasons why self-assessment is important. This may be a generic response or refer to the importance of self-assessment for their own career and personal life.

For 2.1, the learner will need to give clear details about both their strengths and weaknesses. They need to refer to at least two areas of strength and two areas of weakness.

2.2 requires the learner to give at least two reasons why it is important to continue developing the strengths identified in 2.1.

For 2.3, the learner needs to give two reasons why it is important to improve the areas of weakness described in 2.1 and give two ways in which these weaknesses may be improved.

The learner needs to give details about their skills and qualities for 3.1.

For 3.2, the learner will need to explain why two skills or qualities identified in 3.1 are important to their lives.

For 4.1, the learner will need to identify two specific, measurable, attainable, realistic long-term goals and the short-term goals planned for each long-term goal. The evidence for this may be a plan included in the logbook or similar recording tool.

Details of how the success of the goals will be tracked need to be included in the plan for 4.2.

For 5.1, the learner should identify their achievements over a stated period of time.

5.2 requires the learner to give two examples of what they would have liked to have achieved in the stated period of time.

In achieving 5.3, the learner should give two reasons why they were able to accomplish the achievements (identified in 5.1) and two reasons why they were unable to achieve what they would have liked (identified in 5.2).

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

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

Entry Level	Level 1	Level 2
Unit 10: Self-assessment	Unit 10: Self-assessment	Unit 10: Career Progression
Unit 11: Career Progression	Unit 11: Career Progression	Unit 22: Setting and Meeting Targets at Work
Unit 16: Setting and Meeting Targets at Work	Unit 23: Setting and Meeting Targets at Work	

## Essential resources

There are no essential resources for this unit.

## Websites

[www.career-advice.monster.com](http://www.career-advice.monster.com)

[www.careersserviceni.com/Cultures/en-GB/CareerService](http://www.careersserviceni.com/Cultures/en-GB/CareerService)

[www.lifecoachexpert.co.uk](http://www.lifecoachexpert.co.uk)

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

[www.reed.co.uk/CareerTools/SelfAssessments.aspx](http://www.reed.co.uk/CareerTools/SelfAssessments.aspx)

## Unit 10: Career Progression

QCF Level: Level 2

Credit value: 2

Guided learning hours: 20

---

### Unit abstract

This unit will help learners to understand the connection between their own skills, experience and aspirations and possible career opportunities, so that they are able to take a proactive approach to career progression. The emphasis of the unit is on learners locating potential opportunities, information and resources and evaluating them in terms of relevance to their career progression. Learners will explore the ongoing nature of career development and also develop a career progression plan.

### Learning outcomes and assessment criteria

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

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Understand that personal skills, qualities and experience influence career progression	1.1 Analyse their own skills, qualities and experience 1.2 Discuss reasons why their personal qualities, skills and experience might be more suited to some areas of work or learning than others
2 Be able to access information and guidance related to career progression	2.1 Find different sources of information related to career progression 2.2 Evaluate the relevance of the information to their own skills, qualities, experience and career aspirations
3 Understand the importance of work or study opportunities in career progression	3.1 Discuss the career benefits of different examples of work or study opportunities 3.2 Explain how one job role or stage of career development may lead to another

Learning outcomes		Assessment criteria	
The learner will:		The learner can:	
4	Be able to plan their career progression	4.1	Produce a career progression plan
		4.2	Explain the timeline and resources that might be needed to support their career progression plan
		4.3	Discuss appropriate ways of reviewing their career progression plan

## Unit content

---

### 1 Understand that personal skills, qualities and experience influence career progression

*Personal skills, qualities and experience:* interests, work, study and other experience, personal strengths, learned and natural talents, skills and personality

*Suitability of qualities, skills and experience to areas of work or learning:* eg preference for learning in a group situation would suit enrolling on course at college rather than doing an online course from home, physical fitness and strength could suit work on a construction site rather than a desk-based job, experience in caring for a disabled child would suit role as a helper at school for children with disabilities rather than working at a call centre

### 2 Be able to access information and guidance related to career progression

*Information and guidance related to career progression:* eg college, school or community-based careers services, career advisors, Job Centres, Learndirect, progress files, libraries, Careers and Jobs sections in local newspapers, magazines and websites, personal development and career development magazines and websites, industry magazines, websites or publications, employment and careers websites, HR professionals, biographies/interviews of people who have been successful in a career or multiple careers, work placement, progress files, vocational specialists websites such as Connexions, Careers Wales, Careers Scotland, Careers Ireland, sector skills councils and a range of BBC links to *Blast*, *Go Get it*, *One Life – Your World: Work and Future*.

*Relevance of information:* using relevant source depending on type of information sought eg Learndirect useful for learners wanting to undertake online courses, local newspapers useful for finding jobs in local area; deciding whether job information or course information is relevant eg part-time course in business enterprise for employed person intending to set up their own business, job-share role for parent wishing to combine a job with childcare responsibilities, voluntary work at local charity shop for a person planning to progress to paid work in the retail sector

### 3 Understand the importance of work or study opportunities in career progression

*Benefits of different work or study opportunities:* various forms of work and study opportunities eg part-time studies or courses, courses or studies subsidised or paid for by an employer, full-time studies/course, online courses, promotional opportunities at work, training and personal development opportunities, work shadowing and cross-company projects; benefits of work or study opportunities eg 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

*Stages in career development:* 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 skill could lead to new job role, taking on new responsibilities voluntarily could lead to paid promotion

### 4 Be able to plan their career progression

*Career progression plan:* different ways of recording career plans eg electronic, handwritten, charts, diagrams, templates or forms provided by workplace or place of learning; types of goals (short-term, medium-term, long-term); setting goals in plan over appropriate timeframes; using feedback and guidance from appropriate sources in planning career progress eg tutor, teacher, employer, people in similar careers, career advisor, family, friends

*Timeline and resources:* timeline eg targets set in weeks, months, years for achieving goals; resources eg money to pay for training course, support from family or friends in looking after child so parent can take on part-time work, new skills or knowledge needed to qualify for promotion at work

*Reviewing career progression plan:* deciding appropriate time(s) to review career progression plan; revising original career progression plan if necessary; using feedback and guidance from appropriate sources in reviewing career progression plan eg tutor, teacher, employer, people in similar careers, career adviser, family, friends

## Essential guidance for tutors

---

### Delivery

Tutorial sessions would be a useful scenario for delivery of this unit. It could also be integrated into a vocational qualification or delivered in a work-based setting.

Learners should be encouraged to view their learning as the beginning of a lifetime of learning.

It would be useful to focus delivery of the unit on the learner exploring their own skills, qualities and experience, and how these link to career progression. Tutors may wish to discuss the importance of having aspirations and goals and the role played by factors such as a positive self-image and attitude, adaptability and the ability to cope with change.

The opportunity to draw on real-life scenarios is inherent in each learning outcome.

Learners could undertake investigation of their skills and qualities through the use of paper or electronic self-assessment tools. It would be helpful to use a range of exercises or activities which enable learners to analyse their strengths, weaknesses, attitudes, qualities, for example worksheets, team activities and basic personality profile tools. In group discussions, the importance of personal skills and qualities that enable career progression could be considered, for example motivation, determination, flexibility and the desire/ability to learn new skills.

Strengths and skills gaps should be identified in order that individuals may become aware of their development needs and recognise the advantage of relevant work or study opportunities. It is important that learners review their interests, aptitudes and ambitions for the future.

The use of presentations, interviews, case studies, visiting speakers and online careers resources that promote a positive approach to career progression are recommended. Learners could consult a wide variety of resources such as the internet, local and national publications, careers advisers, JobCentres and people from the world of work.

### Assessment

To achieve 1.1, the learner needs to review their previous work or learning in order to undertake an analysis of personal skills and qualities. This may be achieved through the use of paper or electronic self-assessment tools.

For 1.2, the learner needs to give three reasons why their own qualities, experience and skills, analysed in 1.1, are more suited to one stated area of work or learning than another. The learner may be given guidance by the tutor/line manager in selecting the areas of work or learning to discuss but must show independence in putting forward the three reasons required for 1.2.

To achieve 2.1, the learner must include information from three different sources relevant to career progression in a stated area of work or learning. This may include leaflets, downloads from websites, articles from publications or evidence from interviews with career advisers.

2.2 requires the learner to consider whether the information gathered for 2.1 is useful or not in terms of their own career progression, linking the information to personal skills, qualities, experience and ambitions. The learner will need to understand the skills and qualifications needed for their preferred career path.

3.1 requires the learner to explain how two different work or study opportunities benefit career progression. Evidence for this could be based on career progression using examples from real organisations or individuals; alternatively, the learner could explain career progression using an imagined career profile.

To meet 3.2, the learner will need to outline briefly how one stated job role or career stage may help progression to the next stage of a career.

For the career progression plan in 4.1, the tutor/line manager could suggest a number of possible models for the learner to consider. The learner must, however, be able to independently select a method of presenting their career progression plan. The learner should produce a career progression plan in a format which reflects their preferred style of learning, as the emphasis is on producing a career progression plan that can be practically applied in the learner's own situation. Where the learner is in employment, it may be appropriate to use relevant career-planning documents from their workplace. Where the learner does not have access to the workplace, appropriate examples of documents from the college, school or place of learning could be used.

To meet 4.2, the learner will need to justify their timeline and include information about resources they need to support their career progression plan for example 'I need to complete the course part-time over two years as I will need to have a job during the course'.

For 4.3, the learner will need to include information about two ways they could review their career progression plan.

The goals and timeline in the career progression plan should be confirmed by a tutor, line manager or other appropriate person. The plan should include basic suggestions on how the progress and appropriateness of the plan could be reviewed on an ongoing basis.

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

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

Entry Level	Level 1	Level 2
Unit 5: Searching for a Job	Unit 5: Searching for a Job	Unit 4: Searching for a Job
Unit 6: Applying for a Job	Unit 6: Applying for a Job	Unit 5: Applying for a Job
Unit 7: Preparing for an Interview	Unit 7: Preparing for an Interview	Unit 6: Preparing for an Interview
Unit 8: Interview Skills	Unit 8: Interview Skills	Unit 7: Interview Skills
Unit 10: Self-assessment	Unit 10: Self-assessment	Unit 9: Self-assessment
Unit 11: Career Progression	Unit 11: Career Progression	

### Essential resources

The learner will need access to a range of career-related resources such as websites, publications, tutors and careers advisors.

#### Websites

[www.connexions.gov.uk](http://www.connexions.gov.uk)

[www.direct.gov.uk/en/EducationAndLearning](http://www.direct.gov.uk/en/EducationAndLearning)

[www.learndirect-advice.co.uk/helpandadvice](http://www.learndirect-advice.co.uk/helpandadvice)

[www.learndirect-advice.co.uk/helpwithyourcareer](http://www.learndirect-advice.co.uk/helpwithyourcareer)

[www.learndirect-advice.co.uk/helpwithyourcareer/jobprofiles](http://www.learndirect-advice.co.uk/helpwithyourcareer/jobprofiles)

[www.monster.co.uk](http://www.monster.co.uk)

[www.support4learning.org.uk/careers](http://www.support4learning.org.uk/careers)



# Unit 11: Developing Personal Skills for Leadership

QCF Level: Level 2

Credit value: 2

Guided learning hours: 20

---

## Unit abstract

The ability to understand and use effective personal leadership skills is often a desirable aspect of employability. Whether using these skills formally as a team leader or supervisor, or informally to lead a small group of people or convey instructions to others, it is important that learners are able to develop and reflect upon their personal leadership abilities. In this unit, learners gain an understanding of the main features of leadership and how to prepare themselves to demonstrate their leadership skills in an appropriate leadership activity.

## Learning outcomes and assessment criteria

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

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Understand the main features of leadership	1.1 Describe the main features of leadership 1.2 Explain how their own skills and qualities relate to the main features of leadership
2 Plan how to demonstrate leadership skills	2.1 Describe the range of skills they will use to lead others 2.2 Explain how they will put these skills into practice in order to lead others
3 Prepare for a leadership activity	3.1 Select a suitable activity to demonstrate their leadership skills 3.2 Explain why they selected that activity and how it will enable them to demonstrate an appropriate range of skills

## Unit content

---

### 1 Understand the main features of leadership

*Main features of leadership:* responsibility for others eg making sure the team works together and achieves its goals, making sure people are healthy and safe in carrying out their work or task, providing support and guidance eg helping someone deal effectively with a difficult situation, encouraging someone to persevere in solving a problem; giving instructions eg allocating work to the team; giving and receiving feedback eg telling someone they have done something right or suggesting that something could be done differently, listening to feedback from others and acting on it; making decisions eg deciding on what a group of people need to do, who needs to do which activity, solving problems

*Own skills and qualities:* carry out a review of own personal development; identify areas of strength and those areas which you are unsure of/less confident in; ask others for their feedback on your leadership skills

### 2 Plan how to demonstrate leadership skills

*Putting a range of skills into practice:* giving support to others eg by motivating and encouraging others, providing advice and guidance, discussing problems, identifying and understanding others' feelings; allocating tasks and activities eg by assessing strengths and interests of team members, considering deadlines, deciding who is best suited to carry out tasks, discussing and agreeing tasks with team members; giving and receiving feedback eg by formal means such as written reports, appraisals, or informal means such as verbal feedback to individuals, feedback to team on performance of task; making decisions, eg making a decision to solve a problem, deciding on the best way of doing something

### 3 Prepare for a leadership activity

*Selecting a suitable activity:* considering strengths and weaknesses; using information and knowledge about own particular skills to decide on an appropriate activity; discussing with tutor/line manager and agreeing suitability; choosing an activity they can complete appropriately

*Why the activity was selected:* matches experience, skills or interests of the learner; allows learner to demonstrate a skill they feel confident in as well as/ or a skill they wish to improve on

## Essential guidance for tutors

---

### Delivery

In introducing this unit, tutors/line managers could help learners consider what leadership means in a broad context. This could be done in a group discussion in which the tutor asks them to identify different types of leader, what a leader does (for example, what are some of the obvious leadership traits?) and the skills required to become a good leader in a team, group or organisation. Learners could discuss the responsibilities leaders have towards their employees, students or to other people, about their safety and wellbeing, carrying out different tasks or activities in a way that benefits those they are leading, how leaders interact with other people to make decisions, the leader's role in giving instructions, offering advice and guidance to others, and in giving and receiving feedback. Learners could also identify other attributes and qualities of effective leadership which they wish to discuss. Tutors might wish to emphasise that there are different types of leadership and that leadership is not necessarily a complex concept, nor is it accessible only to a few people.

Learners should relate these leadership skills and qualities to their own skills and qualities through discussion either within a group or with the tutor/line manager. They could be encouraged to think more generally about how they have demonstrated leadership skills in the past (for example they may have been a team captain at football or rugby or been a leader in a social context, for example in guides or scouts). They could then go on to think about how their existing skills and qualities can be used, for example if they are good listeners, confident, diplomatic, tactful, so that they understand that leadership can be demonstrated by all sorts of people on different levels.

To assist learners in their planning for learning outcome 2, tutors may wish to give the group a structured activity to consider, for example a defined project or task in which each member can be allocated a particular job, and which has a defined timescale for completion. Learners could then discuss what leadership skills might be needed in a given activity. This can be agreed with their line manager/ tutor in advance and be included in their plan as appropriate.

In preparing for a leadership activity (for learning outcome 3), if learners are in the workplace, they might wish to select naturally occurring opportunities at work that would demonstrate specific leadership skills. These opportunities may be identified with the help of a supervisor or other appropriate colleague. In a non-workplace setting, the tutor may wish to provide examples of real-life or simulated activities where leadership skills can be demonstrated; the learner may be supported to select an appropriate activity from the examples provided.

## Assessment

Evidence for assessment criteria 1.1 and 1.2 could come from a group discussion which shows the individual contribution of the learner, or an individual discussion with the tutor/line manager. This may take the form of a taped discussion, video evidence etc. It may also be supported by written notes from the learner or tutor/line manager. The learner must describe at least three features of leadership and explain how these relate to their own skills and qualities.

For 2.1, the learner needs to be able to plan how they will demonstrate some basic features of leadership. Examples of the kinds of skills that may be included in the learner's plan are detailed in the unit content. The tutor may wish to support the learner in discussing and agreeing the skills they are planning to demonstrate.

Evidence for 2.1 and 2.2 could come via a group discussion which shows the individual contribution of the learner, or an individual discussion with the tutor/line manager. This may take the form of for example a taped discussion, presentation, video evidence. Evidence could also come from written notes in the form of a plan by the learner or written notes of a discussion from the tutor/line manager. The learner must be able to describe at least two skills they would use to lead others and explain how they would put these skills into practice when working with others. The tutor may wish to support the learner in deciding how these skills could be put into practice.

In achieving 3.1, the learner needs to select a suitable, straightforward activity to demonstrate the skills they have chosen. This should be in agreement with the line manager or tutor and could also be a shared agreement with the group if this is appropriate.

For 3.2, the learner should explain why they selected that particular activity, for example the activity was a naturally occurring opportunity to show leadership skills or the activity was something they selected because they thought it would be useful for developing a new skill. The explanation may also involve considering how well they would be able to demonstrate a particular skill via a particular activity.

The learner must also be able to explain how the activity would enable them to demonstrate the skills they have chosen in an appropriate way. They may also want to consider which skills they are strong in and which they need to develop further. They may decide (on agreement with the tutor/line manager) that the demonstration is about practising a new skill or about confirming that they are able to demonstrate a recently acquired skill.

Evidence for 3.1 and 3.2 should come from a group discussion which shows the individual contribution of the learner, or an individual discussion with the tutor/line manager. This could take the form of a taped discussion, video evidence or written evidence. It may also be supported by written notes from the learner or tutor/line manager. The tutor may need to guide the learner to an activity that will allow the appropriate range of skills to be demonstrated. The learner must refer to at least two different types of leadership skills that could be demonstrated.

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

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

Level 1	Level 2
Unit 12: Developing Personal Skills for Leadership	Unit 12: Practising Leadership Skills With Others
Unit 13: Practising Leadership Skills with Others	

## Essential resources

Learners should have access to appropriate sources of information about leadership such as texts, websites and magazines. Learners will also need the opportunity to participate in a group task in which it is appropriate for them to delegate tasks to others.

## Websites

[www.career-advice.monster.com](http://www.career-advice.monster.com)

[www.lifecoachexpert.co.uk](http://www.lifecoachexpert.co.uk)

[www.scoutbase.org.uk/6to25/explorer/youngleader/pdfs/yls-all.pdf](http://www.scoutbase.org.uk/6to25/explorer/youngleader/pdfs/yls-all.pdf)

[www.tellmehowto.net](http://www.tellmehowto.net)



## Unit 12: Practising Leadership Skills with Others

QCF Level: Level 2

Credit value: 2

Guided learning hours: 20

---

### Unit abstract

Working alongside others provides invaluable opportunities for learning how to lead. In this unit, the learner will be able to practise their leadership skills with other members of a group. Learners will gain an understanding of skills such as giving feedback, decision making and allocating of tasks and responsibilities within a leadership context. In addition to developing the learner's leadership skills through working with others, the unit also considers how learners can evaluate their ability to lead others and suggest areas for improvement.

### Learning outcomes and assessment criteria

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

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Understand how to lead a group activity	1.1 Explain how their leadership skills will contribute to a given group activity
2 Demonstrate effective leadership skills with others	2.1 Give support to other members of the group 2.2 Allocate tasks and activities appropriately to other members of the group 2.3 Give and receive appropriate feedback 2.4 Make decisions about tasks and activities appropriately
3 Evaluate their leadership performance	3.1 Carry out an evaluation of their leadership performance 3.2 Suggest areas for improvement of their leadership performance

## Unit content

---

### 1 Understand how to lead a group activity

*Group activities:* in the workplace within a small team, in a school or college (or other place of learning) in a group project eg cross-curricular project, assignment within a vocational or subject-based area

*Leadership skills in a group activity:* leading in a way that is appropriate to the requirements of the situation and people involved eg giving support to others, allocating tasks and activities, giving and receiving feedback, making appropriate decisions, considering deadlines; using personal skills and qualities to lead effectively eg using problem-solving skills to make effective decisions, using sense of humour to get people's attention when giving instructions

### 2 Demonstrate effective leadership skills with others

*Giving support to others:* motivating and encouraging, providing advice and guidance, discussing problems, showing regard for wellbeing, health and safety of team members

*Allocating tasks and activities:* assessing strengths and weaknesses of team members, prioritising tasks to deadlines, deciding who is best placed to carry out tasks, discussing and agreeing with team members

*Giving and receiving feedback:* formal feedback such as written reports, appraisals; informal feedback eg verbal feedback to individuals, feedback to a team on performance of task

*Making decisions:* making a decision to solve a problem, to find a way forward with a task or activity, deciding on the best method of doing something, deciding when a task has been completed appropriately

### 3 Evaluate their leadership performance

*Carrying out an evaluation:* different types of evaluation of leadership; formal evaluation eg assessment forms, checklists; informal evaluation eg discussion with tutor/line manager; using feedback from different sources when evaluating your performance; identifying what went well eg successfully explained purpose of team task to the group; identifying what did not go so well eg did not give detailed enough instructions about time set for the task

*Suggesting areas for improvement:* based on their own assessment (and feedback from others, if appropriate) eg get feedback and suggestions from all team members before deciding on solution to problem in the team task

## Essential guidance for tutors

---

### Delivery

Learners will need to make use of appropriate texts, websites and magazines to find the relevant information for this unit. Valuable information can also come from line managers or tutors and visiting experts.

In thinking about how to lead a group activity, learners could think about leadership in contexts that are familiar to them, for example in their immediate workplace (their team manager, line manager or supervisor) or in their school or college (the headteacher, their tutors). They could also discuss leaders in their local community or that they know socially.

For learning outcome 1, a suitable group activity could be identified in discussion with the group and the tutor/line manager, or tutors could provide examples of given activities. The activity should be straightforward in nature and the leadership required should not be complex.

For learning outcome 2, learners will need an opportunity to demonstrate some of the more obvious features of leadership, within an informal or small group context.

In giving support to other members of the group, learners will need to demonstrate that they can take responsibility for encouraging all group members to work well. The tutor/line manager could therefore encourage the learner to take an appropriate level of responsibility in seeing that the task or activity is carried out appropriately and that the deadline is achieved. Where this is not appropriate or practical, the learner should have the opportunity to explain what has happened and suggest ways in which they could remedy the situation. Learners should be able to provide guidance or advice to others, as appropriate, in carrying out the activity and will need therefore to have a clear idea of what the activity is and how they want to achieve it.

In allocating tasks and activities appropriately, it would be appropriate for learners to take some responsibility for making decisions about who should be allocated which activity. They may wish to review the strengths of group members and decide which members would be most appropriate to carry out the tasks. They could also show that they are able to discuss and agree their allocations with others and communicate to others why decisions have been made. Tutors/line managers may wish to support learners in discussing and agreeing allocations.

In giving and receiving feedback, learners will have the opportunity to demonstrate not only communication skills but also appropriate behaviour and attitudes in dealing with other members of the group. This would include giving feedback to others in an appropriate way that supports the aims of the group. They should also be able to receive feedback from others and show that they have considered the opinions and ideas of others.

In making decisions about tasks and activities, learners will need to demonstrate that they are able to make decisions about straightforward issues, for example about which team members should do which piece of work, or about how long to spend on a given activity. Tutors/line managers should support the learner in identifying a decision and then agreeing with them the steps needed to make it.

In achieving learning outcome 3, tutors and learners should discuss their performance either in a one-to-one or small group situation.

### Assessment

Evidence for 1.1 could come from a group discussion which shows the individual contribution of the learner, or an individual discussion with the tutor/line manager. This could take the form of a taped discussion, video evidence, or presentation in which the learner explains how their leadership skills would contribute to the given activity. It may also be supported by written notes from the learner or tutor/line manager.

Evidence for 2.1, 2.2, 2.3 and 2.4 could come from either an observation of the learner by the tutor, line manager or other designated person or from written evidence. The learner must demonstrate that they can support other members of the group, allocate tasks and activities appropriately, give and receive feedback and make decisions about tasks and activities.

The observation can take the form of a witness statement, observation notes or a video of the learner's presentation to the group with supporting notes. If in a written format, evidence of the learner's communication must be provided (for example copies of emails, memos or letters) with a supporting commentary from the tutor/line manager, if appropriate.

Evidence for 3.1 and 3.2 could come from a one-to-one discussion between the tutor/line manager and the learner or (if appropriate), a small group discussion in which the learner reviews their performance, describing what went well and what did not go so well. The learner needs to discuss at least one aspect that they felt pleased with (for example making a good decision which improved the group's performance) and one that they did not feel went so well (for example interrupting another member of the group). The learner must also suggest at least one area where their leadership performance could be improved.

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

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

Level 1	Level 2
Unit 12: Developing Personal Skills For Leadership	Unit 11: Developing Personal Skills for Leadership
Unit 13: Practising Leadership Skills with Others	

## **Essential resources**

Learners should have access to appropriate sources of information about leadership such as texts, websites and magazines. Learners will also need the opportunity to participate in a group task that allows them to show leadership skills.

### **Websites**

[www.career-advice.monster.com](http://www.career-advice.monster.com)

[www.lifecoachexpert.co.uk](http://www.lifecoachexpert.co.uk)

[www.scoutbase.org.uk/6to25/explorer/youngleader/pdfs/yls-all.pdf](http://www.scoutbase.org.uk/6to25/explorer/youngleader/pdfs/yls-all.pdf)

[www.tellmehowto.net](http://www.tellmehowto.net)



# Unit 13: Learning with Colleagues and Other Learners

QCF Level: Level 2

Credit value: 2

Guided learning hours: 20

---

## Unit abstract

Colleagues and other learners are a valuable resource in the learning process, and this unit introduces learners to the importance of this resource. Learners will have the opportunity to demonstrate that they can work as part of a group in a learning and development context, understanding learning goals and interacting appropriately with their peer group. Learners will also reflect on their experience of learning with a group of colleagues or other learners.

## Learning outcomes and assessment criteria

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

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Understand the importance of learning with colleagues or other learners	1.1 Explain why learning with their colleagues or other learners is important for their own development
2 Plan the learning they will undertake with colleagues or other learners	2.1 Describe a learning goal which they will be able to undertake with colleagues or other learners 2.2 Explain how they will work towards achieving the learning goal
3 Be able to interact appropriately with colleagues or other learners in a learning situation	3.1 Respond appropriately to advice from others 3.2 Express beliefs and opinions to others appropriately 3.3 Give helpful feedback to others

Learning outcomes	Assessment criteria
The learner will:	The learner can:
<p>4 Review the learning they have undertaken with colleagues or other learners</p>	<p>4.1 Give examples of how they have learned with colleagues or other learners</p> <p>4.2 Reflect on their experience of learning with a group of other colleagues or other learners</p>

## Unit content

---

### 1 Understand the importance of learning with colleagues or other learners

*Importance of learning with others:* finding more effective answers and solutions to tasks or problems through interaction with other co-workers or learners eg solving a problem by using ideas from several people rather than just own ideas; developing interpersonal skills through learning alongside others eg patience, empathy, tolerance, flexibility, loyalty, reliability

### 2 Plan the learning they will undertake with colleagues or other learners

*Learning goals:* identifying an aspect of their learning they can undertake with co-workers or other learners; identifying a goal they can work towards or that is relevant to development in their field of work or study eg attend team training course to learn new customer service skills for call centre, work in a group to do research for school assignment

*Working towards the learning goal:* eg attend training course and attempt all tasks given on course, complete assigned part of group/team project, compile list of questions to ask visiting speaker during question and answer session

### 3 Be able to interact appropriately with colleagues or other learners in a learning situation

*Responding appropriately to advice from others:* thanking someone for their advice, asking an appropriate question about the advice offered, being polite in expressing that you don't agree with the advice

*Expressing beliefs and opinions:* preferences and dislikes, relevance of an aspect of learning to them, how useful the learning was

*Giving helpful feedback:* feedback to other learners on how useful learning was, what could be improved or changed

### 4 Review the learning they have undertaken with colleagues or other learners

*Examples of learning with others:* informal learning situations eg team-building activities or development activities, day-to-day working with a team of people at the same level; formal learning situations eg training courses, induction days, classes, workshops

*Reviewing the learning with others:* deciding whether the experience of learning with others was successful eg whether the group task was achieved, whether the learner found out new information from others or acquired new skills from being with others; considering anything that could have been done better eg the learner should have paid more attention to the suggestions and ideas of other learners or co-workers in the group

## Essential guidance for tutors

---

### Delivery

Tutors should encourage learners to talk about the importance of learning with their colleagues or other learners. They could consider, for example, how it helps their own development to learn with people at a similar level. Learners could think about how they benefit from learning alongside people working at the same level as them (for example team colleagues, classmates or other learners) and people who have the same level of experience as them (for example people they come into contact with during activities such as training courses or on induction sessions). These should be people familiar to the learner and with whom they come into contact with, although this may not necessarily be on a day-to-day basis.

For learning outcome 2, tutors/line managers may wish to discuss and agree the learning goal in advance with the learner. For example, this could be about learning a new skill or developing their communication skills, about learning a new IT package or finding out information relevant to their work. A group or team development session, (run informally or formally as appropriate to the learning) would also be useful for learning outcome 2. For learners who have access to the workplace, this could be a formal training course, workshop or an induction session which the learner plans to attend with the agreement of their line manager/tutor.

Learning outcome 3 may be demonstrated during an activity such as a training course or in a team building or development session in which the learner's peers are also present.

For learning outcome 4, learners might find it helpful if tutors encourage them to reflect on questions about how and what they have learned with their co-workers or other learners. This could include 'What types of activity did I/the group carry out?' 'How did this help my learning?' 'What new skills/information did I learn? Did I learn anything useful that I did not expect to learn?' 'Did I make the progress I expected towards my goal, and if not, what else do I need to do?'

Learners should also be given the opportunity to reflect on their learning experience with others. They could consider what they thought the benefits were of learning in a group situation rather than learning on their own. Learners could also think about whether or not the learning experience was a positive one, and if not, what benefits they see in learning alone.

### Assessment

Evidence for 1.1 could come from a group discussion which shows the individual contribution of the learner, or an individual discussion with the tutor/line manager. This may take the form of a taped discussion, video evidence or other appropriate form. It may also be supported by written notes from the learner or tutor/line manager. To achieve 1.1, the learner needs to describe why learning with other learners or colleagues is important for their personal development.

Evidence for 2.1 and 2.2 could come from a one-to-one discussion between the tutor/line manager and the learner in which the learner describes a learning goal they will be able to undertake with peers and explains how they will work towards achieving the learning goal.

Evidence for 3.1 to 3.3 could come from either an observation of the learner by the tutor, line manager or other designated person or from written evidence. At least one example of each kind of behaviour is required. The evidence could take the form of a witness statement, observation notes or a video of the learner's interaction with other colleagues or learners, along with supporting notes. If in a written format, evidence of the learner's communication must be provided (for example copies of emails, memos or letters) with a supporting commentary from the tutor/line manager, if appropriate.

The learner should be able to respond appropriately to advice from others in the group, for example advice on how to do something better. The advice given by others could be directed to the learner individually or to a group of which the learner is a part. The learner should also show that they are able to express beliefs and opinions to others appropriately. Their beliefs and opinions could relate to the general learning situation or to their own learning. Additionally, the learner must show they are able to give helpful feedback about their learning in an appropriate way. For example, if the learner is filling in feedback forms at a training course, they could provide helpful suggestions about how to improve the course and what they found useful or not. The information should be able to be used by others to improve on training or development situations.

Evidence for 4.1 and 4.2 could come from a one-to-one discussion between the tutor/line manager and the learner or a small group discussion in which the learner gives at least one example of how they have learned with colleagues or other learners (for 4.1). 4.2 requires the learner to reflect on their shared learning experience, describing at least one example of what they have learned, understood or gained from the experience of working/learning with others.

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

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

Entry Level	Level 1	Level 2
Unit 20: Preparing for Work Placement	Unit 14: Learning with Colleagues and Other Learners	Unit 17: Learning from More Experienced People
Unit 21: Learning from Work Placement	Unit 18: Learning from More Experienced People	Unit 18: Building Working Relationships with Colleagues
	Unit 19: Building Working Relationships with Colleagues	Unit 26: Preparing for Work Placement

Entry Level	Level 1	Level 2
	Unit 28: Preparing for Work Placement	Unit 27: Learning from Work Placement
	Unit 29: Learning from Work Placement	

### Essential resources

Learners should have access to situations where they learn alongside co-workers or other learners.

### Websites

[www.lifecoachexpert.co.uk](http://www.lifecoachexpert.co.uk)

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

# Unit 14: Communicating Solutions to Others

QCF Level: Level 2

Credit value: 2

Guided learning hours: 20

---

## Unit abstract

Being able to solve problems and share solutions with others is a valuable skill for employability, learning and for life in general. In this unit, learners will find out why a problem requires a solution, how to communicate possible solutions to others in an appropriate way and how to deal with responses to what has been presented. Additionally, the learner will review the effectiveness of their performance in presenting a solution to others and suggest possible areas for improvement.

## Learning outcomes and assessment criteria

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

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Understand why they need to solve a problem	1.1 Describe a possible problem to solve 1.2 Explain why the problem requires a solution 1.3 Describe a way to solve the problem
2 Communicate the solution effectively to others	2.1 Using appropriate communication methods, explain to others how the problem was solved 2.2 Use appropriate information to support their explanation
3 Provide appropriate responses to questions or objections	3.1 Identify possible questions or objections to their solutions to a problem 3.2 Plan how to deal with feedback and questions from others in the group 3.3 Respond appropriately to questions or objections from others

Learning outcomes	Assessment criteria
The learner will:	The learner can:
4 Evaluate their performance	4.1 Evaluate how effective their performance was 4.2 Suggest areas for improvement

## Unit content

---

### 1 Understand why they need to solve a problem

*Possible problems to solve:* differences of opinion, new situations, misunderstandings, poor instructions, lack of communication, inadequate management, unforeseen events or emergencies, changes in situation or environment, need for new services/processes/products, need to improve or change a current situation, need to test or check new ideas, need to find information

*Reasons why the problem requires a solution:* eg lack of communication could lead to missed deadlines, inadequate management or knowledge means quality of work would not be so good, project cannot be undertaken unless sufficient knowledge/funding/resources are available, changes in technical equipment could lead to problems in producing a product, learner cannot complete project on climate change without first finding out why climate change is occurring

*Ways to solve problems:* eg rewrite staff manual in plain English, consult staff about revised rotas, investigate possible effects of changing technical equipment before changing the equipment, submit an application for funding for a project, enrol in training course to improve customer service skills

### 2 Communicate the solution effectively to others

*Methods of presentation:* verbal presentation either formally or informally; written presentation eg by email, project, portfolio, letter

*Appropriate information:* background research, evidence of where the solution has been used before successfully; what has improved since the problem was solved or what could improve once the problem is solved; who was contacted to provide support, guidance or advice

### 3 Provide appropriate responses to questions or objections

*Possible questions/objections:* wanting more detail about the solution, having a different view from that presented, not agreeing with the view presented, finding problems with the proposed solution

*Responding appropriately:* give clear and accurate information; provide full information; offer to provide further information if necessary; deal with questions politely and tactfully; take on board other people's views

#### 4 Evaluate their performance

*Carrying out an evaluation:* discussion with tutor/line manager either formally or informally; using a checklist or appropriate evaluation form; identifying what went well and what did not go well

*Suggesting how to improve on own performance:* eg not interrupt those who are asking questions about the solution, speaking more slowly when explaining how the problem was solved

## Essential guidance for tutors

---

### Delivery

In relation to learning outcome 1, tutors/line managers might find it useful to give learners the opportunity to take part in group or teamwork in which the contribution of each member of the group can be assessed. The tutor/line manager may wish to support the group in identifying a problem, and it is suggested the learner focuses on problems which are related to a work or learning context. Alternatively, learners could work individually in describing a problem to their tutor/line manager.

Tutors/line managers might wish to guide learners to carry out some simple research into methods to use in solving the problem for learning outcome 1. This could include prompts of where to find appropriate information to solve a problem requiring background research, prompts of who to contact for support or guidance either within or outside of the organisation (for example the human resources department for a problem with annual leave or sickness absence, a tutor for a problem relating to a class project), or prompts regarding some ways in which learners might tackle the problem, for example comparing advantages and disadvantages of one approach to another.

Opportunities for developing and practising the communication skills needed for learning outcomes 2 and 3 may be achieved, for example, by organising learners into groups and then asking one member from a group to present their solution to another group. This could all be done informally and within small groups so that learners feel confident in their presentation. The learner could also choose other ways to communicate, for example if the people the learner needs to contact are not immediately available, the learner could choose to draft an email or a memo which describes the problem and solution. These written documents need not be lengthy or complex.

For learning outcome 4, tutors/line managers and learners would probably find it most appropriate to discuss performance either in a one-to-one or small group situation.

Depending on the context used within the unit, tutors/line managers may wish to access a range of information in delivering this unit. For example, the unit could be used as part of a cross-curricular project in a school or college setting, or can be used within the workplace to encourage learners to develop problem-solving and communication skills. There could also be links to national schemes such as Young Engineers, BA CREST awards, mathematics challenges or apprenticeship awards.

Learners should use appropriate texts, websites and magazines. Valuable information can also come from line managers or tutors, guest speakers and visiting experts.

## Assessment

Evidence for 1.1, 1.2 and 1.3 could come from a group discussion which shows the individual contribution of the learner, or an individual discussion with the tutor/line manager. This may take the form of a taped discussion, video evidence or other appropriate format. It may also be supported by items such as written notes or photographic evidence from the learner or tutor/line manager. The learner needs to describe a possible problem, explain why it needs to be solved and describe one possible way of solving it.

The problem described by the learner should not be overly complex and the learner must be able to describe at least one way in which the problem could be solved. The solution described by the learner need not be sophisticated, but must evidence that the learner has arrived at the solution through some research or discussion with others. The learner needs to explain why the problem is actually a problem, for example it may be that something is a problem because it results in a piece of work being completed too slowly and so a deadline is missed, or something might be a problem because, unless it is solved, a team goal cannot be reached.

Evidence for 2.1 and 2.2 could either come from an observation of the learner by the tutor, supervisor, line manager or other designated person, or from written evidence. The learner must demonstrate that they can explain how the problem was solved and use appropriate information to support their explanation.

The observation can take the form of a witness statement, observation notes or a video of the learner's presentation to the group with supporting notes. If in a written format, evidence of the learner's communication must be provided (for example copies of emails, memos or letters) with a supporting commentary from the tutor/line manager if appropriate.

Evidence for 3.1, 3.2 and 3.3 could come from either an observation of the learner by the tutor, line manager, supervisor or other designated person, or from written evidence. The learner must identify two possible questions and/or objections that others might have concerning the solution they are presenting. The learner must also be able plan how they would respond to such questions or objections and then show that they can respond in the appropriate way as intended. Whether interacting with others via written means or face-to-face, the learner needs to respond clearly and politely to any questions or objections raised.

The observation could take the form of a witness statement, observation notes or a video of the learner's presentation to the group with supporting notes. If in a written format, evidence of the learner's communication should be provided (for example copies of emails, memos or letters) with a supporting commentary from the tutor/line manager if appropriate.

Evidence for 4.1 and 4.2 could come from a one-to-one discussion between the tutor/line manager and the learner in which the learner evaluates how effective they were in communicating their solution to others. 4.1 requires the learner to identify at least one aspect that was successful (for example the learner was able to answer all the questions raised by others) and one that was less successful (for example the learner forgot to run a spelling check on their presentation documents). For 4.2, the learner needs to suggest at least one area for improvement in their performance (for example have more supporting information available when presenting a solution).

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

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

Entry Level	Level 1	Level 2
Unit 17: Solving Work-related Problems	Unit 15: Communicating Solutions to Others	Unit 23: Solving Work-related Problems
Unit 19: Speaking Confidently at Work	Unit 24: Solving Work-related Problems	

## Essential resources

Learners should be able to access appropriate sources of information on communicating solutions to problems such as books, websites and magazines.

### Websites

[www.lifecoachexpert.co.uk](http://www.lifecoachexpert.co.uk)

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

[www.tellmehowto.net](http://www.tellmehowto.net)

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

[www.worketiquette.co.uk](http://www.worketiquette.co.uk)



## Unit 15: Effectiveness at Work

QCF Level: Level 2

Credit value: 1

Guided learning hours: 10

---

### Unit abstract

In any workplace, it is important to work effectively to achieve personal, team and organisational goals. Understanding what makes an effective employee, and being able to demonstrate these skills, are essential aspects of employability.

This unit focuses on understanding the importance of positive attitudes and behaviours both within and outside of the workplace. Learners will have to demonstrate that they understand and can demonstrate appropriate behaviours in the workplace. They will also need to show that they are able to represent their workplace appropriately with customers or others outside of the organisation. Learners will need to review the strengths and weaknesses of their conduct and suggest improvements to their performance.

### Learning outcomes and assessment criteria

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

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Understand effective workplace behaviour	1.1 Explain different ways in which employees can behave effectively within the workplace or when representing their employer outside of the workplace
2 Demonstrate effective working practice	2.1 Interact appropriately with a wide range of colleagues in the workplace 2.2 Represent the workplace positively when dealing with customers or others outside of the workplace 2.3 Apply organisational procedures appropriately
3 Evaluate their own practice	3.1 Describe what went well and what did not 3.2 Suggest areas for improvement of their performance

## Unit content

---

### 1 Understand effective workplace behaviour

*Different ways in which employees can behave effectively:* interacting with other colleagues in the workplace eg communicating appropriately with other colleagues, managing your time and workload; interacting appropriately with customers in the workplace; paying attention to effective working guidelines in the place of work eg codes of conduct, personal reviews/appraisals, human resources guidelines; working outside of the organisation eg welcoming delegates to an external meeting, behaving appropriately towards customers when visiting a client site, behaving appropriately when attending an external training course as part of their job

### 2 Demonstrate effective working practice

*Interact appropriately with others in the workplace:* interactions with different types of colleagues in carrying out day-to-day work eg senior managers, team members, line managers, unfamiliar colleagues

*Represent the workplace positively when dealing with customers or others outside of the workplace:* show appropriate behaviour when on company/organisation business outside of the workplace eg conferences, external meetings, training courses, visits to customer's place of work

*Apply organisational procedures appropriately:* applying procedures when carrying out your job eg follow health and safety rules for dealing with hazardous substance in factory, deal with customer enquiry according to guidelines in the training manual, fill in relevant form to request time off work for hospital appointment

### 3 Evaluate their own practice

*Evaluation of own practice:* identify what went well eg dealing promptly with customers, receiving positive feedback from colleagues; identify what did not go so well eg not understanding what was requested by senior colleagues or customers; suggesting areas for improvement eg better communication with other team members, ask supervisor for help when needed

## Essential guidance for tutors

---

### Delivery

This unit may be delivered in the workplace, as part of a work placement or volunteering commitment, or in a simulated situation in a school or college. The positive behaviours described in the unit are those expected of learners within an educational context as well as employees in a workplace. It is, therefore, likely that learners will already be aware of the need for appropriate conduct in a general context.

Learning outcome 1 could be delivered through group discussion or through discussion between the learner and their line manager, supervisor, tutor or another appropriate person familiar to the learner. Tutors/line managers might wish to support the group or individual learner in facilitating a broad discussion about what the learner thinks it means to be an effective employee. This could include aspects such as their interactions with others, the way in which they manage their workload, their interactions with customers. Learners could create presentations, posters or leaflets to record their ideas.

It might also be useful for tutors/line managers and learners to discuss some examples from the workplace that show what different organisations and workplaces consider to be 'effective', for example in the construction industry this might be about completing a job on time and to a certain quality, in a call centre this could be about the number of calls dealt with and the quality of the service, in retail it could be about helping customers and improving sales figures.

Tutors/line managers could then move to discussing the conduct and behaviour expected of employees working outside of the organisation, for example when working with customers off-site of the employer's premises or representing the organisation at conferences. Examples of representing the organisation could include: welcoming delegates at a conference, handling basic enquiries at an exhibition, dealing with customers on the phone when outside of the place of work, directing clients or visitors to meetings.

Learning outcome 2 could be delivered in a variety of ways. If in a work situation, learners could carry out their normal daily activities whilst being observed by their line manager or another responsible person. In a simulated situation, learners could be provided with (or agree with their tutor) a scenario for the workplace which enables them to demonstrate the relevant behaviours. Where the demonstration of working practice is not in the workplace, learners should be encouraged to demonstrate that they can interact positively with unfamiliar people, for example visitors to a college or training venue.

Learners could be observed undertaking a range of day-to-day activities to demonstrate that they can apply organisational procedures. They could be using organisational systems appropriately (for example human resources systems such as timesheets, annual leave forms), using the correct forms and documents (for example headed paper, forms for procurement or for finance), using IT appropriately (for example email and the internet), telephone systems (for example voicemail,

answering calls). There may be instances when learners can demonstrate other organisational procedures, for example if there is a fire drill they could show that they have understood and can act on the organisational procedures governing this.

For learning outcome 3, learners could evaluate their own practice through a one-to-one discussion between the tutor/line manager and the learner. Learners and tutors/line managers would discuss how the learner fared in their demonstration of effective practice. Learners should have the opportunity to talk through how they might handle some aspects differently and improve in the future. The tutor/line manager might wish to support the learner in identifying appropriate people to seek advice or feedback from about their performance.

## **Assessment**

To achieve 1.1, the learner must be able to demonstrate an understanding of effective working and the range of attitudes and behaviours that apply within and outside of the workplace. Evidence to support this could be in the form of records of group or individual discussion. These can either be written by the tutor/line manager, by the learner with sign-off from the tutor/line manager, or be via video or audio recording.

To achieve 2.1, the learner must demonstrate effective working practice by interacting with a wide range of colleagues in the workplace, including people not familiar to them, for example a senior manager. Whatever the types of colleague, it is important that the learner is able to interact with them positively at a range of levels and familiarities.

For 2.2, the learner needs to know how to represent the workplace positively when dealing with customers or others outside of the workplace. They would not be expected to represent an organisation at a high level or to take responsibility for decision making on behalf of an organisation. The learner does not have to be outside of the workplace to demonstrate 2.2.

For 2.3, the learner must be able to apply at least two organisational procedures appropriately.

The demonstration of 2.1-2.3 should be observed either by the tutor or another person designated to assess the learner (this could be a line manager or supervisor, for example). The observation must form the basis of a discussion with the learner after the demonstration of performance. This observation could take the form of a written statement by the tutor or line manager (which would support good practice for appraisal and review in the workplace) or could be a video with supporting commentary from the tutor or line manager.

To achieve 3.1 and 3.2, the learner must describe at least two aspects of their performance that went well (for example dealing with a customer promptly or receiving a positive response from a colleague or customer on their performance) and one aspect that did not go so well (for example getting nervous when speaking to a senior manager) and be able to suggest areas for improvement. The learner may reflect on their performance by discussing it with the tutor or other observers. Following these reflections, the learner must independently identify and record any areas and strategies for improvement.

Evidence to support this can be either written, for example written statements from the learner on the review of their performance and/or supporting statements from the tutor, line manager or other person involved in the discussion and review, or through video or taped discussion.

Written statements by the learner do not have to be lengthy and can be discussed and agreed by the tutor/line manager and the learner in advance.

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

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

Entry Level	Level 1	Level 2
Unit 12: Conduct at Work	Unit 16: Positive Attitudes and Behaviours at Work	Unit 16: Working in a Team
Unit 9: Self-management Skills	Unit 17: Working in a Team	Unit 18: Building Working Relationships with Colleagues
Unit 13: Working in a Team	Unit 19: Building Working Relationships with Colleagues	Unit 8: Self-management Skills
	Unit 9: Self-management Skills	Unit 19: Building Working Relationships with Customers

### Essential resources

Copies of organisational procedures for different types of organisation as appropriate for example school or college procedures for staff and/or learners relating to conduct and behaviour (or if in the workplace, copies of workplace procedures).

Relevant training or developmental courses relating to good conduct (for example assertiveness, communication skills etc).

Copies of any appraisal systems which recognise good conduct/performance.

### Websites

[www.career-advice.monster.com](http://www.career-advice.monster.com)

[www.lifecoachexpert.co.uk](http://www.lifecoachexpert.co.uk)

[www.worketiquette.co.uk](http://www.worketiquette.co.uk)

[www.worksmart.org.uk/career](http://www.worksmart.org.uk/career)



## Unit 16: Working in a Team

QCF Level: Level 2

Credit value: 3

Guided learning hours: 30

---

### Unit abstract

Teamworking skills are extremely valuable in the workplace and are also transferable to other areas of life. In this unit, learners will consider the advantages of teamwork and why varied skills and strengths are needed by team members to complete tasks successfully. Learners will gain knowledge of how to work positively as a team member by contributing to a team task. Additionally, learners will understand how to reflect on their own and the team's effectiveness in completing the task. They will consider their individual contribution to the team's performance and areas where the team could improve their teamworking skills.

### Learning outcomes and assessment criteria

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

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Understand the advantages and disadvantages of having a team complete a task	1.1 Explain the advantages and disadvantages of having a team complete a task
2 Understand the need for a team to work to an agreed code of conduct	2.1 Identify a code of conduct for effective team work 2.2 Explain the likely consequences of team members not following a code of conduct
3 Be able to recognise the different strengths, skills and experiences different people bring to a team	3.1 Explain their own strengths, skills and experiences, as relevant to a task being undertaken by a team 3.2 Identify some relevant strengths, skills and experiences that other members bring to a particular team

Learning outcomes		Assessment criteria	
The learner will:		The learner can:	
4	Understand how to allocate roles and responsibilities within the team in relation to a given task	4.1	Agree with other team members the roles and responsibilities of each member of the team
		4.2	Explain how each role contributes to the team's objectives and the completion of the team task
5	Work positively as a member of a team	5.1	Describe ways in which respect was shown for the ideas and suggestions of others
		5.2	Identify relevant ideas and suggestions which were given and which helped the team to complete their task
		5.3	Describe ways in which help, support or advice was given to team members where appropriate
		5.4	Explain why it is important to respond positively to advice or constructive criticism
		5.5	Complete tasks allocated to the required standard and on time
6	Reflect on the performance of a team	6.1	Discuss how their individual performance contributed to the overall performance of the team
		6.2	Outline ways in which the team as a whole performed effectively
		6.3	Outline areas in which the team could improve its team work skills

## Unit content

---

### 1 Understand the advantages and disadvantages of having a team complete a task

*Advantages of teamwork:* employee/learner strengths and weakness can be balanced; team members motivate/encourage/support each other; skills of all members are used; responsibility is shared; team members feel a sense of belonging; individuals feel valued

*Disadvantages of teamwork:* needs careful planning; takes time to plan and set up; needs agreement or cooperation of all members; task may be better completed by one person; task may require directing by a leader

### 2 Understand the need for a team to work to an agreed code of conduct

*Code of conduct for teamwork:* eg every member should contribute; listen to views of all team members; value contributions of others; accept constructive criticism; consult with other team members; make decisions as a group; follow group decisions; carry out agreed responsibilities

*Consequences of team members not following code of conduct:* team task not completed on time, team task not completed correctly or to appropriate standard, conflict between team members, confusion about individual tasks and responsibilities, team members feel let down, team members feel reluctant or anxious about working or learning with other team members in future

### 3 Be able to recognise the different strengths, skills and experiences different people bring to a team

*Teamwork skills, strengths and experiences:* practical skills eg ability to cook, paint, use a computer, good with numbers and money, interpersonal skills eg patient, friendly, enthusiastic, loyal, communication skills eg confident speaker, good listener, motivational skills eg good at encouraging or helping others, organisational skills

### 4 Understand how to allocate roles and responsibilities within the team in relation to a given task

*Agree roles and responsibilities:* on the basis of objectives of team task; timescale/deadline for completion; awareness of skills and strengths of all team members; matching skills and strengths of team members to individual tasks eg confident speaker suited to leading verbal presentation, experience in using internet suited to searching for information online

## 5 Work positively as a member of a team

*Respect ideas and suggestions of others:* listen politely to ideas and suggestions of others, don't interrupt someone who is explaining their idea or suggestion, thank other team members for their ideas or suggestions

*Offer ideas or suggestions for team task:* offer ideas on ways to speed up time needed to achieve team task, make suggestions about how to improve quality of the item the team is making

*Give help, support or advice to others:* offer to help team member who is having difficulty carrying out their task, suggest a better way of doing something, agree to take on an extra task whilst fellow team member is absent

*Respond positively to advice or constructive criticism:* value of the advice or constructive criticism from others eg creates awareness of personal strengths and weaknesses, creates awareness of quality of work and areas for improvement; maintain positive atmosphere and relationships in the team by responding appropriately to advice or constructive criticism eg listen to the advice offered, don't interrupt the person who is speaking, avoid inappropriate language such as sarcasm, offensive remarks

*Complete own task successfully and on time:* carry out own task to appropriate standard within agreed timescale eg finished assembling two display boards with correct materials one day before the team presentation date, compared prices for baking ingredients and provided the pricing information to team at the time requested, obtained feedback sheets from customer and reported back to team within two days of the deadline

## 6 Reflect on the performance of a team

*Individual performance as a team member:* follow code of conduct, complete individual task appropriately and on time, carry out individual responsibilities, offer help to others, offer feedback or advice to others, contribute to success of whole task

*Performance of team:* team worked well together, every team member made contribution, team task completed to satisfactory standard, team task completed on time

## Essential guidance for tutors

---

### Delivery

The unit has been designed to make the key topics practically based as learners will be participating in a team task.

To develop knowledge and understanding of the advantages and disadvantages of teamwork, guest speakers from colleges, schools, workplaces or other appropriate areas could be invited to speak about their experiences of teamwork. Learners could prepare questions to ask the speakers about the advantages and disadvantages of teamwork for learning outcome 1. In understanding this concept, learners might find it helpful to look at scenarios which give different examples of tasks which are suitable for teamwork and those which are better completed by individuals. Learners in the workplace might find it useful to ask questions of other colleagues regarding the advantages and disadvantages of teamwork or use the internet to find information about the experiences of other people.

Teams and teamwork tasks need to be agreed before considering learning outcomes 2, 3, 4, 5 and 6. Teams could be made up of around four to eight people who have the potential to complete the task that has been set. If the teamwork task is not assigned to an existing team known to the learner, the learner will need some time to get to know the other team members in order to be able to identify their relevant strengths, skills and experiences required for learning outcome 3. Learners could work in their teams to agree tasks which are manageable, achievable and match the skills and interests of the team.

For learning outcome 2, learners should use different methods to agree a code of conduct, for example group discussion, research and investigation. In particular, at this level, they should try to think through what might happen if aspects of the code of conduct were not followed. Learners will probably find it easier to come up with consequences of not following a team code of conduct if they do so in relation to different teamwork scenarios. Appropriate examples of different scenarios could be provided by the tutor or line manager for this purpose. Groups could work to design a poster or presentation which identifies the agreed code of conduct for their own task. The posters or presentations could be displayed in the class or work area for learners to refer to during the rest of the unit.

For learning outcome 4, learners could work in their teams to allocate roles and responsibilities to all team members. Each learner could individually analyse their own contribution to the whole task and report back for the team to agree.

Learners could compile a logbook which could include the agreed roles and responsibilities of all the team. The logbook will help the learner to monitor their performance which is required for learning outcome 5.

For learning outcome 6, learners could discuss both the performance of individuals and that of the team as a whole as part of a group exercise. They could watch recordings of some of their activities and comment on their performance, as well as taking on board the comments of any observers.

## Assessment

In order to achieve 1.1, the learner will need to explain three advantages and two disadvantages of teamwork. Practical examples of team work situations could be given to support the explanation.

For 2.1, the code of conduct could be produced in a leaflet or as a poster and could relate to a specific task or group work in general. The poster or leaflet must include three likely consequences of team members not following the code of conduct for 2.2.

3.1 requires the learner to describe how at least one of their own strengths, skills and experiences are relevant to some aspects of the agreed team task. The learner must identify at least two strengths, skills and experiences of other team members in order to meet 3.2. The evidence for 3.1 and 3.2 needs to be recorded in an appropriate format such as a logbook.

To achieve 4.1, the role played by the learner in agreeing the roles and responsibilities of the team members must be clearly evidenced. An observation record or witness statement could be completed by the tutor/line manager to show that the learner has played an appropriate role in this regard.

For 4.2, the learner must explain how each team member's role contributes to the team's objectives and the completion of the team task. The learner could compile a logbook to record the explanations for 4.2. The logbook could take a variety of formats, depending on the needs of the individual learner.

The evidence required for 5.1, 5.2, 5.3, 5.4 and 5.5 may be included in the logbook completed by the learner during the team task. The logbook will need to be verified by the tutor or line manager. Alternative methods of evidencing may be used for example witness statement or observation.

6.1, 6.2 and 6.3 may be evidenced in group discussion. Responses should be recorded for verification purposes.

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

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

Entry Level	Level 1	Level 2
Unit 12: Conduct at Work	Unit 17: Working in a Team	Unit 15: Effectiveness at Work
Unit 13: Working in a Team	Unit 16: Positive Attitudes and Behaviours at Work	Unit 18: Building Working Relationships with Colleagues
	Unit 19: Building Working Relationships with Colleagues	

## **Essential resources**

Learners will need the opportunity to participate in a teamworking task.

### **Websites**

[www.career-advice.monster.com](http://www.career-advice.monster.com)

[www.lifecoachexpert.co.uk](http://www.lifecoachexpert.co.uk)

[www.projectsmart.co.uk/team-building.html](http://www.projectsmart.co.uk/team-building.html)

[www.worksmart.org.uk/career](http://www.worksmart.org.uk/career)



# Unit 17: Learning from More Experienced People

QCF Level: Level 2

Credit value: 2

Guided learning hours: 20

---

## Unit abstract

One of the key ways in which people learn and develop is by interacting with others who are more experienced in a particular field of work or study. These may be visiting experts, colleagues who are senior, or others working at a similar level who have spent longer in that particular field. In this unit, learners will find out how to recognise what they have learned from senior or more experienced people, evaluate the usefulness of what they have learned and put these skills into practice for themselves.

## Learning outcomes and assessment criteria

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

Learning outcomes	Assessment criteria
<b>The learner will:</b>	<b>The learner can:</b>
1 Understand situations where they might interact with more experienced people	1.1 Describe situations in which they might interact with more experienced people
2 Understand how more experienced people work effectively	2.1 Describe an effective way of working demonstrated by a more experienced person 2.2 Explain why this way of working was effective
3 Understand how they can improve their performance by learning from those who have more experience	3.1 Describe an example of a skill or process they have learned from others with more experience 3.2 Explain how they can use what they have learned to improve their performance

Learning outcomes	Assessment criteria
The learner will:	The learner can:
4 Review what they have learned from more experienced people	4.1 Carry out an evaluation of the skills, knowledge or understanding they have learned from more experienced people

## Unit content

---

### 1 Understand situations where they might interact with more experienced people

*More experienced people:* more experienced team members or learners eg line managers, supervisors, managers, heads of department, team leaders; people in other teams eg finance department, human resources department; external experts or consultants, members of other organisations, clients, customers, tutors, teachers

*Situations of interaction with more experienced people:* receiving advice, instruction or teaching from more experienced people in formal and informal contexts eg classes, presentations, training sessions, workshops; working alongside more experienced people eg working in a team with more experienced colleagues or learners, observing more experienced people at work eg work shadowing, attending a meeting, attending a presentation

### 2 Understand how more experienced people work effectively

*Examples of effective ways of working and why they are effective:* doing things effectively has positive impact for individuals and the workplace, organisation, school or college eg treating other learners/staff/customers/ with respect makes people feel valued and meets expected standards of the workplace/place of learning, meeting workplace targets or deadlines for handing in an assignment keeps people on track for a given schedule or timetable, producing high quality work raises the person's self-esteem, participating in meetings or group activities helps others learn or do their work effectively, modelling good personal conduct has an impact on a class by setting high standards for behaviour and work

### 3 Understand how they can improve their performance by learning from those who have more experience

*Skills or process learned from more experienced person:* new or improved skills eg how to deal effectively with customer complaints, how to write a summary, how to test a physics theory, how to manage personal finances, how to set a goal

*Using what has been learned to improve own performance:* eg using new skills in customer service to reduce number of customer complaints, using new skills in personal finance to save money for a specific purpose, using new knowledge about a microscope to use it more easily and quickly in next science experiment

#### 4 Review what they have learned from more experienced people

*Evaluating the skills, knowledge or understanding learned from more experienced people:* how easy or difficult it was to learn something new from someone with more experience; how completely/successfully the new skill, knowledge or understanding has been learned; how relevant or useful the new skill, knowledge or understanding is to the learner's work or learning situation

## Essential guidance for tutors

---

### Delivery

Via group or individual discussion, learners will need the opportunity to describe situations in which they might interact with more experienced people in the workplace or in a school, college or other place of learning. Examples of more experienced people could include managers, other colleagues they have identified as being more experienced, customers, tutors and visiting experts or consultants. Tutors could encourage learners to talk about the relationship they have with the more experienced people in their workplace, college or school, for example Is this a formal or informal relationship? What differences and similarities are there in the different relationships they have?

Learners would find it useful to discuss what effective working looks like in their particular workplace or place of learning. This may be about interacting with other people appropriately, for example customers, colleagues, tutors, managers, visiting consultants. The discussion might also include examples such as producing high quality reports or pieces of work and fulfilling responsibilities in the workplace, school, college or other place of learning.

In relation to learning outcomes 2 and 3, learners need opportunities to observe more experienced people demonstrating skills, knowledge, processes and ways of working. This could come about via a wide range of activities such as work shadowing, presentations by visiting experts, interviews with more experienced learners or colleagues, or even day-to-day-interaction with more experienced persons in a place of learning or work.

Learners might need support in making the connection between effectiveness and having a positive impact on the workplace or learning environment. It would be helpful to direct learners to the question of why what they observed in a more experienced person was effective, for example did the behaviour of the more experienced person make a good impact on a customer so that they returned with more business? Did the piece of work they completed inform new developments in a certain area of study or help other colleagues to make informed decisions about solving a problem?

### Assessment

Evidence for 1.1 to 3.2 could come from a group discussion which shows the individual contribution of the learner, or an individual discussion with the tutor, supervisor or line manager. Evidence may take the form, for example, of a taped discussion, video evidence or presentation. It may also be supported by written notes from the learner or the tutor/line manager.

In achieving 1.1, the learner must describe at least two situations in which they might interact with more experienced people and how they interact with these people. The situations described should involve people either familiar to the learner or people the learner could reasonably expect to come into contact with in their workplace, college, school or place of learning.

For 2.1 and 2.2, the learner needs to describe at least one effective way of working demonstrated by a more experienced person and explain why this way of working was effective.

3.1 requires the learner to select at least two examples of skills, knowledge or understanding they have learned from more experienced people. For 3.2, the learner will need to describe clearly how the specific skills, understanding or knowledge could be used to improve their performance in their own work or learning situation.

Evidence for 4.1 is possibly most effectively derived from a one-to-one discussion between the tutor/line manager and the learner in which the learner carries out an evaluation of what they have learned. This may be supported by written notes from the learner.

In achieving 4.1, the learner must evaluate the skills, knowledge and understanding they have learned from more experienced people while working with them or receiving instruction from them. Within this evaluation, the learner needs to describe how easy or difficult it was to learn the new skills, knowledge or understanding. The learner needs to discuss whether or not they think they have fully grasped the new skills, knowledge or understanding. Additionally, the learner must explain how relevant or useful the new skills, knowledge or understanding are to their specific work or learning situation.

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

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

Entry Level	Level 1	Level 2
Unit 20: Preparing for Work Placement	Unit 14: Learning with Colleagues and Other Learners	Unit 13: Learning with Colleagues and Other Learners
Unit 21: Learning from Work Placement	Unit 18: Learning from More Experienced People	Unit 18: Building Working Relationships with Colleagues
	Unit 19: Building Working Relationships with Colleagues	Unit 26: Preparing for Work Placement
	Unit 28: Preparing for Work Placement	Unit 27: Learning from Work Placement
	Unit 29: Learning from Work Placement	

### **Essential resources**

Learners should have access to a variety of other people in the workplace, school or college who can demonstrate positive behaviours to them and who can be used for questioning or work shadowing purposes.

### **Websites**

[www.lifecoachexpert.co.uk](http://www.lifecoachexpert.co.uk)

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



# Unit 18: Building Working Relationships with Colleagues

QCF Level: Level 2

Credit value: 2

Guided learning hours: 20

---

## Unit abstract

This unit explores the ways in which colleagues rely upon one another in a constructive working environment. Learners will consider the consequences of positive and negative behaviours of individuals for whole teams or organisations. A key focus of the unit is to help learners develop some of the most important behaviours necessary to interact effectively with colleagues. This includes communicating clearly with colleagues, knowing how to resolve differences appropriately and being able to offer and receive help, ideas and suggestions when interacting with colleagues in the workplace.

## Learning outcomes and assessment criteria

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

Learning outcomes	Assessment criteria
<b>The learner will:</b>	<b>The learner can:</b>
1 Understand how people in the workplace depend on one another	1.1 Explain the interdependencies between different people in a workplace
2 Understand how an individual's behaviour affects other people at work	2.1 Describe how the positive behaviour of one person can affect others in the workplace 2.2 Describe how the negative behaviour of one person can affect others in the workplace

Learning outcomes		Assessment criteria	
The learner will:		The learner can:	
3	Be able to demonstrate positive behaviours that promote effective working with others	3.1	Communicate clearly with colleagues
		3.2	Resolve differences with colleagues amicably
		3.3	Offer help and guidance to colleagues and accept their help and guidance
		3.4	Offer ideas, suggestions and opinions to colleagues
		3.5	Consider the ideas, suggestions and opinions of colleagues and respond appropriately

## Unit content

---

### 1 Understand how people in the workplace depend on one another

*Different people in the workplace depend on one another:* in teams, departments and organisation as a whole; people need one another to perform their individual roles in order to achieve common work goal eg to provide a service, to generate money eg in working towards common goal of selling a certain amount of goods, sales managers depend on team leaders to pass on information about sales targets, team leaders depend on team members to reach their sales targets and team members rely on sales managers to set realistic targets

### 2 Understand how an individual's behaviour affects other people at work

*Individual behaviour can have positive implications for others:* consequences for individual colleagues eg raising a colleague's self-confidence by giving them positive feedback; consequences for a group of people eg boost given to team morale by individual member being cheerful and helpful

*Individual behaviour can have negative implications for others:* consequences for other individuals eg individual who uses sexist language finds that a colleague is uncomfortable working alongside them, individual who does not pass on accurate telephone messages to line manager causes line manager to waste time clarifying the messages; consequences for a group of people eg the organisation misses a delivery deadline because an individual did not complete a required task, a team is unable to carry out their work effectively because one team member continually turns up late for work

### 3 Be able to demonstrate positive behaviours that promote effective working with others

*Communicating clearly:* verbal communication eg language level, punctuation (if written communication); non-verbal communication eg body language, tone of voice, place and time of communication

*Resolving differences:* appropriate behaviour when resolving differences in the workplace eg avoiding offensive language and shouting; resolving differences at appropriate time and in appropriate place eg not settling disputes in front of customers; knowing where to get support (if needed) in resolving the conflict eg line manager, human resources department, impartial mediator

*Offer and receive help and guidance:* benefits of offering and receiving help and guidance for self and for the other individual/the team/the organisation eg learning a new skill from someone else which is useful for promotion, saving team time by showing others the most efficient method of doing something; knowing appropriate ways to offer/receive help and guidance eg asking someone if they would like help rather than telling them that they need help, thanking someone who has offered help or guidance, even if it is not needed; knowing appropriate sources for help and guidance eg line manager, supervisor, human resources department, a mentor or 'buddy' system

*Offer ideas, suggestions, opinions to colleagues:* offering your ideas/suggestions/opinions to others in appropriate way eg using polite language, avoiding a rude, aggressive or patronising tone, leaving room for others to decline your offer of help or disagree with your opinions

*Listen to the ideas of others and respond appropriately:* importance of paying attention to the ideas of others eg a way of showing respect to others, learning new information from the ideas put forward by others; showing others that you have paid attention to their ideas eg not interrupting someone who is talking, replying promptly to an urgent email or letter; responding appropriately to the ideas of others in the workplace eg carrying out a task on time if requested, asking a colleague for clarification if the idea they suggested is unclear

## Essential guidance for tutors

---

### Delivery

Evidence for this unit could be gathered through a part-time job, voluntary work commitment, work experience or simulated activity. If learners have no current access to the workplace but have previously been employed, they should draw on these prior experiences wherever appropriate. Group activities, where some members of the group do have workplace experience, will support those members who have none.

In order to help learners gain insight into the various concepts covered in the learning outcomes, guest speakers from the world of work, or who are knowledgeable about workplace behaviour, could be invited to speak to learners about building positive relationships with colleagues. Speakers such as employers and human resources staff could share their expectations in terms of how colleagues should treat one another and potential consequences of inappropriate behaviour in this regard.

For learning outcome 1, learners might find it helpful to discuss examples of teamworking and hierarchies within an organisation. Basic examples such as a production line are useful starting points and learners could then go on to consider more complex issues such as leadership, morale, group success and differing roles and responsibilities (for example however well the workshop staff produce the product, if the marketing team don't get it noticed or the sales team don't get any into the shops, the business will not succeed). Learners could use methods such as posters, flowcharts or presentations to illustrate their findings in reference to a particular organisation.

For learning outcome 2, the concept of 'others in the workplace' could include peers, managers, supervisors, other colleagues, groups of people and individuals. Learners would find it helpful to first identify what constitutes positive and negative behaviour in terms of interrelationships. In thinking about negative behaviour in the workplace, learners should be encouraged to consider the effect of the behaviours on other people (for example a racist comment is likely to make other colleagues feel angry and unwilling to work with the individual or respect their views in the future), and the effects of the behaviour on the organisation as a whole (for example refusing to help another colleague to solve a problem means company time is wasted)

For learning outcome 3, learners might want to think not only about how to give and receive help in the workplace, but also about the benefits of doing so, for example learning new skills, developing positive working relationships, saving valuable working time.

## Assessment

To achieve 1.1, the learner must explain at least two examples where achieving a workplace goal requires people depending on one another to do their own individual jobs or tasks. The examples need not be complex or lengthy.

For 2.1, the learner needs to describe two examples of the impact of an individual's positive behaviour on another person or group of people (including the organisation as a whole). The positive behaviours for 2.1 should be in line with those stated in 3.1 to 3.5, but need not match them exactly. In achieving 2.1, the learner may provide other examples such as motivational behaviours from managers or giving and receiving constructive feedback.

2.2 requires the learner to describe two examples of the impact of an individual's negative behaviour on another person or group of people (including the organisation as a whole). Negative behaviour considered for 2.2 might include examples such as inappropriate language, rudeness, not listening to others, not fulfilling their own job role, discriminatory behaviour.

To achieve 3.1 to 3.5, the learner must demonstrate, either in the workplace or through simulation, that they are able to get on with employers/managers and their peers. Witness statements, checklists or video evidence would be useful ways to record the behaviours referred to in 3.1 to 3.5. Evidence needs to be gathered from interaction with all types of colleagues eg peers, managers, employers. The learner should behave in a positive manner throughout the activity and have the opportunity to provide evidence of each of the behaviours set out in the assessment criteria.

For 3.1, the learner must evidence an ability to communicate clearly with others. The learner's language, attitude and behaviour needs to be appropriate for the situation and should aid the clarity of the message being conveyed. The communication may be about a task, idea, enquiry, event, instruction or any other appropriate workplace occurrence.

To achieve 3.2, the learner needs to demonstrate, or refer to an example (either real or simulated), of when they resolved a difference or disagreement with a colleague in an appropriate way. In resolving the difference or disagreement, the learner must demonstrate, or explain, that they always aim to resolve conflict in a dignified way.

For 3.3, the learner must demonstrate, or refer to, two examples (either real or simulated), of when they offered help and guidance to colleagues and at least one example of when they accepted help and guidance from colleagues. In both the offering and receiving of help and guidance, the learner's behaviour in doing so must be positive and appropriate.

In achieving 3.4, the learner needs to show that they can put forward at least one idea, suggestion or opinion to colleagues. If the learner is in the workplace, the idea, suggestion or opinion should be communicated in a way that follows any relevant code of conduct or procedure for that workplace. In a simulated scenario, the idea, suggestion or opinion put forward by the learner must be communicated in an appropriate way and the learner must show that their idea, suggestion or opinion is being communicated in accordance with generally accepted norms and codes of conduct in the workplace.

The learner's response to the ideas, suggestions or opinions of colleagues in 3.5, must demonstrate (either in a real or simulated scenario) that the learner has paid careful attention to the information put forward by the colleague. This could be done for example by giving an appropriate answer to a question asked by a peer, making appropriate references to what a colleague has previously communicated, asking a question to clarify something a colleague has said, accurately carrying out a task requested by a manager. Furthermore, the response must be appropriate in terms of the origin of the idea, suggestion or opinion. For example, if a request for a task to be carried out is put forward by a line manager, the learner's response would need to show they accept the authority of the line manager to delegate appropriate tasks to them. To achieve 3.5, the learner must demonstrate, or refer to, two examples where they responded appropriately to the ideas, suggestions or opinions of colleagues.

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

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

Entry Level	Level 1	Level 2
Unit 12: Conduct at Work	Unit 19: Building Working Relationships with Colleagues	Unit 15: Effectiveness at Work
Unit 13: Working in a Team	Unit 16: Positive Attitudes and Behaviours at Work	Unit 16: Working in a Team
	Unit 17: Working in a Team	Unit 19: Building Working Relationships with Customers
	Unit 20: Building Working Relationships with Customers	

### Essential resources

Learners will need the opportunity to participate in activities that involve colleagues, whether in a real workplace or simulated environment.

### Websites

[www.lifecoachexpert.co.uk](http://www.lifecoachexpert.co.uk)

[www.worketiquette.co.uk/ColleagueRelationshipsCategory](http://www.worketiquette.co.uk/ColleagueRelationshipsCategory)

[www.worksmart.org.uk/career](http://www.worksmart.org.uk/career)



# Unit 19: Building Working Relationships with Customers

QCF Level: Level 2

Credit value: 2

Guided learning hours: 20

---

## Unit abstract

The focus of this unit is on helping learners develop the skills needed to provide good customer service, and to build their understanding of the importance of the customer to any organisation. Learners will be introduced to the concept of customer service standards and the way in which organisations ensure their delivery through the use of protocols. They will also have the opportunity to demonstrate effective communication with customers and gain an understanding of procedures for dealing with customer problems and complaints.

## Learning outcomes and assessment criteria

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

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Understand how a customer's or client's interactions with employees influence their opinion of the organisation as a whole	1.1 Explain how an employee's self-presentation can affect a customer's opinion of the individual and their organisation 1.2 Explain why keeping customers satisfied is important to organisations
2 Understand why organisations normally have protocols for dealing with customers	2.1 Describe the key areas likely to be contained in a customer service protocol 2.2 Explain why it is important for employees to follow customer service protocols

Learning outcomes		Assessment criteria	
The learner will:		The learner can:	
3	Interact positively with customers in line with given protocols	3.1	Follow an organisation's protocols to provide answers to commonly occurring customer queries or meet commonly occurring customer requests
		3.2	Communicate appropriately with customers
		3.3	Explain the procedures within an organisation for dealing with customer problems and complaints
		3.4	Describe when it would be necessary to involve colleagues in assisting the customer

## Unit content

---

### 1 Understand how customer's or client's interactions with employees influence their opinion of the organisation as a whole

*Effects of employee's self-presentation:* customers form negative or positive impression of employee based on employee's self-presentation eg employee using aggressive tone of voice suggests that they are unwilling to help customer, employee thanking customer for their enquiry suggests that they think customer is important; customers form negative or positive view of organisation based upon the way employee presents themselves eg employee not listening carefully to customer's request suggests that the organisation does not care about customers, employee whose personal appearance is tidy suggests that the organisation is well-organised

*Importance of customer satisfaction:* helps organisations to meet their financial or service goals; potential benefits to organisation meeting financial or service goals eg staff bonuses, recruitment of new staff, opening new branches, promotion of existing staff, boost to organisation's image or reputation; potential negative consequences if organisations do not meet financial or service goals eg employee's jobs put at risk, no pay rises given, damage to organisation's image or reputation

### 2 Understand why organisations normally have protocols for dealing with customers

*Key areas in customer service protocols:* common key areas eg receiving enquiries by telephone/email/post/in person, following up customer enquiries, dealing with customer complaints, referring customers to other departments

*Importance of following protocols:* ensuring that high level of customer service is maintained by all employees; ensuring all employees know how to treat customers and what to do in various situations, negative implications of not following protocols eg unhappy customers, employee could face disciplinary action

### 3 Interact positively with customers in line with given protocols

*Dealing with common customer queries or requests:* knowing how to deal with customer queries or requests eg through training, use of reference documents; following organisation's protocols in dealing with customer queries or requests eg deliver customer's takeaway meal within 30 minutes of the time of order or offer them a 20 percent discount if the delivery is late

*Communicate appropriately with customers:* being helpful in manner, language and attitude eg listening carefully to the customer, asking for clarification if necessary, using a friendly, pleasant tone of voice so that customer feels welcome and at ease

*Dealing with customer problems and complaints:* different ways of knowing organisation's rules for dealing with customer problems and complaints eg via training, employee manuals, work shadowing, experience in the job role; different aspects of organisation's procedures for complaints and problems eg specific ways of reporting complaint or problem, fixed timelines for dealing with complaint/problem, approved ways of resolving the problem or responding to the complaint eg if customer requests a refund for faulty goods, check whether the goods are faulty and customer's proof of purchase before offering a refund and apologising for any inconvenience caused

*Involving other colleagues in assisting the customer:* referring customer to another colleague if you are unable or unauthorised to deal with customer's request or query; seeking the advice/help of other colleagues so that you can resolve customer request or query yourself (if appropriate)

## Essential guidance for tutors

---

### Delivery

Evidence for this unit could be gathered through a part-time job, work experience, volunteering commitment or simulated activity. Guest speakers, learners interviewing someone from a customer service role, case studies and film or video clips could all aid learner understanding and enhance delivery of the unit. If learners have no current access to the workplace but have previously been employed, they should draw on these prior experiences wherever appropriate. Group activities, where some members of the group do have workplace experience, will support those members who have none.

Learners could create a poster, leaflet or presentation to show their competence in achieving learning outcomes 1 and 2.

It would be helpful if learners examined several examples of protocols to identify common themes or headings (for example phone etiquette, response to letters, face-to-face encounters, procedures for handling complaints). Learner engagement could be encouraged by making use of protocols drawn from workplaces members of the group have access to.

In delivering learning outcome 2, learners might wish to participate in tutor-facilitated or small group discussions about the importance of customer service protocols. Learners should be made aware that an organisation's customer service protocol is the means by which it seeks to ensure consistently high standards of customer service across the organisation. It is also important for learners to think about the implications of not following customer service protocols for example dissatisfied customers or possible disciplinary procedures if employees deviate from protocols, particularly if this happens regularly.

Learning outcome 3 may be delivered in a variety of ways. If in a work situation, learners could carry out their normal daily activities whilst being observed by their line manager, supervisor or another responsible person. In a simulated situation, learners could be provided with (or agree with their tutor) a scenario for the workplace which enables them to demonstrate customer service skills. Tutors/line managers may wish to spend time with learners in preparation for the demonstration or observation, for example carrying out a simulated activity in which the tutor, line manager or other observer provides help or support to the learner.

### Assessment

For 1.1, the learner must explain the potential affect on the customer of both positive and negative self-presentation. One example of the effect of negative self-presentation and one example of the effect of positive self-presentation is required. The learner's explanation will need to include how an employee acts as a representative of their organisation, that the customer forms an opinion of the employee based on their self-presentation and that customers tend to make judgements about the whole organisation based on the representatives they encounter.

In achieving 1.2, the learner must explain that satisfied customers are good for an organisation as their patronage helps the organisation to meet its financial or service goals. The learner must show that they understand that unsatisfied customers are likely to take their business elsewhere or make a complaint, and that this is bad for the financial or service goals of the organisation.

For 2.1, the learner needs to describe the key areas likely to be contained in a customer services protocol for a particular workplace. This should be a workplace with which the learner is familiar, either through their current workplace experience or through considering examples of specific customer service protocols. The number of key areas will vary, depending on the workplace context, but typically the learner will need to describe at least two key areas.

2.2 requires the learner to give at least two reasons why it is important for an employee to follow an organisation's customer service protocols.

For 3.1, the learner must follow a given protocol to deliver the aspects of customer service detailed in the assessment criteria. At least one customer query or request must be dealt with by the learner appropriately and effectively. The customer query or request may relate to goods or services, but should be familiar and routine in nature. For simulated exercises, the protocol may be one produced by the tutor (in which case it should be realistic and based on actual protocols). Where the learner is being assessed in the workplace, the protocol should, wherever possible, be the customer service documentation from that organisation.

For 3.2, the learner will need to show that they are able to interact appropriately with customers. In a workplace or simulated scenario, their behaviour should demonstrate a helpful attitude towards customers by for example showing that they are listening to the customer's question, politely asking questions to find out further information if the customer's request is unclear, offering to be of further assistance in the future. Two examples of helpful behaviour are required.

To achieve 3.3, the learner is not expected to deal with customer complaints or solve problems, but needs to show they understand how the organisation's policy requires them to act in the event of a customer complaint or problem. This needs to be evidenced via means such as a discussion with a tutor/line manager, a poster, leaflet, worksheet or written notes.

For 3.4, the learner must describe at least one instance when they could deal successfully with a customer's query or request by getting advice/help from a colleague, and one instance when they would need to refer the customer's query or request directly to another colleague or department.

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

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

Entry Level	Level 1	Level 2
Unit 12: Conduct at Work	Unit 19: Building Working Relationships with Colleagues	Unit 15: Effectiveness at Work
Unit 16: Setting and Meeting Targets at Work	Unit 20: Building Working Relationships with Customers	Unit 18: Building Working Relationships with Colleagues

### Essential resources

Learners will need access to examples of customer service protocols and will need to participate in a customer service activity, whether in a real workplace or simulated environment.

### Websites

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

[www.worketiquette.co.uk/VerbalCommunicationcategory](http://www.worketiquette.co.uk/VerbalCommunicationcategory)

[www.worketiquette.co.uk/WorkEtiquetteBasicsCategory](http://www.worketiquette.co.uk/WorkEtiquetteBasicsCategory)



## Unit 20: Investigating Rights and Responsibilities at Work

QCF Level: Level 2

Credit value: 1

Guided learning hours: 10

---

### Unit abstract

Employees and employers have responsibilities to each other. They should also expect their rights to be upheld. These rights and responsibilities relate to areas such as the provision of terms and conditions of employment, privacy of personal information, health and safety, equal opportunities and the right to be paid a minimum wage. The *Health and Safety at Work Acts* set out responsibilities and rights for both employees and employers. Employees are expected to carry out their work in a way that has regard for the safety of others. Employers are expected to abide by a range of requirements governing such aspects as providing safe machinery and equipment, carrying out regular health and safety checks, ensuring the training of employees in health and safety issues, and carrying out a risk assessment to assess the dangers of particular work activities.

The aim of this unit is to help the learner understand what is meant by the terms 'rights' and 'responsibilities' and how they are enforced. They will also gain an understanding of some of the legislation that is there to protect them and the employer. The unit will also help the learner find sources of help and advice relating to their rights and responsibilities.

### Learning outcomes and assessment criteria

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

Learning outcomes	Assessment criteria
<b>The learner will:</b>	<b>The learner can:</b>
1 Understand why rights and responsibilities are important in a workplace	1.1 Explain reasons why rights and responsibilities are important in a workplace 1.2 Understand how rights and responsibilities are established and enforced in a workplace

Learning outcomes		Assessment criteria	
The learner will:		The learner can:	
2	Understand why employees and employers have certain rights and responsibilities	2.1	Identify the rights and responsibilities an employee has at work
		2.2	Explain the implications of employee rights and responsibilities
3	Be able to access sources of guidance and information about rights and responsibilities at work	3.1	Identify key representative bodies for employers and employees who would be able to advise on rights and responsibilities
		3.2	Describe the type of advice given by key representative bodies

## Unit content

---

### 1 Understand why rights and responsibilities are important in a workplace

*Reasons why rights and responsibilities are important:* safety and wellbeing of staff, visitors and customers in the workplace, complying with the law, complying with standards and morals of our society, provides guidelines for resolving workplace problems or conflict in an appropriate way, establishes order and agreed obligations in a workplace, enables employers to conduct business in a fair and productive way, protection of employees, protection of employers

*Types of rights:* rights eg human rights, rights in workplace, rights of the child, legal rights, informal rights eg club membership

*Types of responsibilities* eg member of society, workplace responsibilities, family responsibilities

*How rights and responsibilities are established and enforced:* use of legislation, codes of conduct; regulatory or advisory bodies/organisations; employer and peer expectations

### 2 Understand why employees and employers have certain rights and responsibilities

*Rights and responsibilities:* health and safety; pay and benefits; job recruitment and advertising; terms and conditions at work; contract of employment; appraisal, promotion and training; dismissal, redundancy and retirement, privacy of personal information

*Implications:* safe work environment; policies and procedures; work culture

### 3 Be able to access sources of guidance and information about rights and responsibilities at work

*Representative bodies:* eg HSE (Health & Safety Executive), Citizens Advice Bureau, Equality and Human Rights Commission, trade unions, staff associations, CRB (Criminal Records Bureau)

*Type of advice:* safety of working environment and practices; financial; legal; benefits

## Essential guidance for tutors

---

### Delivery

Although this unit could be presented through small group discussions, it is important to use a range of delivery methods. Television programmes or extracts from films can be a valuable learning tool. Similarly, speakers invited to share their experiences can also be a useful source of information.

Learners could consider the concept of rights and responsibilities in general before they focus on those that relate to the workplace. Discussion might include human rights, children's rights, consumer or patient rights, rights and responsibilities set out in legislation and those that are less formal such as those relating to particular groups or settings (for example within a school, society or club): they could consider issues such as justice, fairness, equality, citizenship and safety. They could then go on to relate these to the context of the workplace.

Tutors will need to be creative in their approach to this unit which is largely based on knowledge and understanding rather than skills. Active learning, however, can still be achieved, for example through learners going into the workplace to interview employers and employees or through role-playing scenarios. Debate and discussion should also be encouraged, particularly when defining the terms and considering rights and responsibilities beyond those enshrined in law.

For each assessment criterion, it is likely that group discussion and shared research will be appropriate. However, learners should independently record their assessment evidence.

### Assessment

In order to achieve 1.1, the learner must give at least one reason why rights are important in the workplace, and at least one reason why responsibilities are important in the workplace. In addition, the learner's explanations must show a clear understanding of the terms 'rights' and 'responsibilities'.

For 1.2, the learner will need to consider how rights and responsibilities are established and enforced at work. The learner could be given a case study which requires them to identify how certain aspects of legislation could be enforced. Alternatively, the learner could select two different rights and explain how they are enforced in the workplace.

For 2.1 and 2.2, the learner needs to identify at least two rights and responsibilities for each area listed in the unit content. Employer rights are much fewer than employer responsibilities; it is reasonable, therefore, that the learner should focus largely on employer responsibilities. They must also be able to explain the implications of the rights and responsibilities, rather than just listing them. For example, a learner listing an employee's right to one week's notice for every full year worked, could note that this means an employer cannot dismiss a member of the workforce on the spot simply because they are no longer needed.

For 3.1, the learner must identify three key representative bodies. For 3.2, they must then describe the type of advice given by each of the chosen representative bodies. Trade unions, staff associations and bodies such as the CBI or trade associations may be used as sources of information and guidance. A case study may be used for this criterion.

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

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

Entry Level	Level 1	Level 2
Unit 2: Working as a Volunteer	Unit 21: Investigating Rights and Responsibilities at Work	Unit 2: Working as a Volunteer
Unit 9: Self-management Skills	Unit 2: Working as a Volunteer	Unit 8: Self-management Skills
Unit 12 Conduct at Work	Unit 9 Self-management Skills	Unit 15: Effectiveness at Work
Unit 14: Investigating Rights and Responsibilities at Work	Unit 16: Positive Attitudes and Behaviours at Work	Unit 21: Managing Your Health at Work
Unit 15: Managing Your Health at Work	Unit 22: Managing Your Health at Work	Unit 26: Preparing For Work Placement
Unit 20: Preparing for Work Placement	Unit 28: Preparing for Work Placement	
Unit 22: Safe Learning in the Workplace	Unit 30: Safe Learning in the Workplace	

## Essential resources

Learners will need access to appropriate sources of information about rights and responsibilities in the workplace.

### Websites

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

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

[www.direct.gov.uk/en/RightsAndResponsibilities/Yourright](http://www.direct.gov.uk/en/RightsAndResponsibilities/Yourright)

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

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

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

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

## Unit 21: Managing Your Health at Work

QCF Level: Level 2

Credit value: 1

Guided learning hours: 10

---

### Unit abstract

The aim of this unit is to help the learner understand how they can be instrumental in managing their own health whilst at work. The learner will find out what their responsibility is in maintaining good health at work. They will consider the importance of taking regular breaks throughout the day, maintaining a balanced diet and wearing suitable clothing for the job. The learner will also learn what services the employer might offer to the employee and other sources of help to ensure good health at work.

### Learning outcomes and assessment criteria

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

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Understand the employee's role in maintaining good health at work	1.1 Explain how employees can maintain good health in the workplace
2 Know the services employers can provide to help maintain the health of the workforce	2.1 Explain services that can be provided by employers to help maintain the health of the workforce
3 Know sources of help to ensure good health at work	3.1 Describe different sources of help to ensure good health at work 3.2 Explain the services offered by different sources of help

## Unit content

---

### 1 Understand the employee's role in maintaining good health at work

*Employee's role:* appropriate diet and exercise; reduce and report potential risks and hazards; wear correct protective clothing if required; take regular breaks, maintain work-life balance; manage ill health appropriately

### 2 Know the services employers can provide to help maintain the health of the workforce

*Services provided by employers:* first aid; health surveillance and medical check-ups; access to health support networks eg advice on dealing with addictions, counselling services; sick pay; health initiatives to benefit employees eg healthy eating campaigns in workplace canteen, keeping active campaigns, subsidised gym memberships or bicycle purchases for staff, onsite gym or recreational facilities, free annual flu vaccinations at work

### 3 Know sources of help to ensure good health at work

*Sources of help:* workplace occupational health; trade unions; community occupational health; first aid officer; health and safety officer; support networks (particularly for self-employed workers)

*Services offered by sources of help:* prevention of risks or hazards to health in the workplace; counselling for stress, addictions or any other personal difficulties; advice on rights and responsibilities in the workplace; risk assessments; provision of specialist support equipment, first aid treatment to deal with injuries or medical incidents in the workplace

## Essential guidance for tutors

---

### Delivery

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

In learning outcome 1, learners will need to explore the role they have to play in maintaining their own health at work. Practical scenarios may be given which allow the learner to identify what action they could take to ensure good health for example 'How can employees maintain good health when a sickness bug goes through the workplace'? Learners could also be provided with newspaper or magazine articles to find out what type of health situations arise and how good health may be promoted.

In learning outcome 2, the learner will find out about the services that an employer might provide to promote good health. If possible, a local employer could be invited to talk about the services they offer. Alternatively, an internet search could be undertaken of large companies to find out what services they offer.

Learners should be given the opportunity to find information on different sources of help available to them at work. They should understand the role of the service and what the service provides. It would also be appropriate to consider services available to the self-employed worker.

### Assessment

In order to achieve 1.1, the learner must explain how employees can maintain good health in the workplace. The learner will need to provide detailed information on five different examples for example the employee is responsible for maintaining a healthy diet and taking regular exercise. Practical examples of how this can be achieved must also be provided for example using the stairs instead of the lifts, and drinking sufficient water throughout the day. This information could be evidenced in a number of different ways, for example the learner may gather the information and present it to the group or they may prepare an article for an internal newsletter for colleagues. If this assessment method is chosen, the learner should use language, formatting and structure appropriate for the intended audience.

For 2.1, the learner must explain two different services that an employer provides to promote healthy working. This evidence may be in the form of a letter to employees naming the service on offer and explaining what the service is. Alternative methods of evidencing learning may be used.

3.1 and 3.2 require the learner to describe different sources of help to ensure healthy working and explain the services provided. Three different sources should be described and an explanation of the services offered should be given for each source.

The learner could produce a leaflet or poster to evidence this. Alternatively, they may participate in a discussion which highlights sources of help to ensure healthy working, with the tutor recording the required descriptions and explanations provided by the learner.

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

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

Entry Level	Level 1	Level 2
Unit 2: Working as a Volunteer	Unit 2: Working as a Volunteer	Unit 2: Working as a Volunteer
Unit 9: Self-management Skills	Unit 9: Self-management Skills	Unit 8: Self-management Skills
Unit 12: Conduct at Work	Unit 16: Positive Attitudes and Behaviours at Work	Unit 15: Effectiveness at Work
Unit 14: Investigating Rights and Responsibilities at Work	Unit 21: Investigating Rights and Responsibilities at Work	Unit 20: Investigating Rights and Responsibilities at Work
Unit 15: Managing Your Health at Work	Unit 22: Managing Your Health at Work	Unit 26: Preparing For Work Placement
Unit 20: Preparing for Work Placement	Unit 28: Preparing for Work Placement	
Unit 22: Safe Learning in the Workplace	Unit 30: Safe Learning in the Workplace	

### Essential resources

Learners will need access to appropriate sources of information about maintaining good health at work.

### Websites

[www.direct.gov.uk/en/Employment/Employees/HealthAndSafetyAtWork](http://www.direct.gov.uk/en/Employment/Employees/HealthAndSafetyAtWork)

[www.workingforhealth.gov.uk](http://www.workingforhealth.gov.uk)

[www.worksmart.org.uk/health](http://www.worksmart.org.uk/health)

## Unit 22: Setting and Meeting Targets at Work

QCF Level: Level 2

Credit value: 2

Guided learning hours: 20

---

### Unit abstract

The ability to manage personal targets in the workplace is of both short-and long-term benefit to the personal and career plans of the individual. In this unit, the learner will find out how to develop and present their personal targets in an appropriate way for a specific workplace situation, and in keeping with organisational targets. They will consider the process of reviewing targets, including when to review progress, recognising where progress has been made and where targets are yet to be reached.

### Learning outcomes and assessment criteria

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

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Understand how to develop and confirm personal targets	1.1 Develop personal targets that are appropriate for a workplace situation 1.2 Identify relevant team or organisational targets which relate to own personal targets 1.3 Confirm own personal targets with an appropriate person 1.4 Present own personal targets in an appropriate format to suit organisational requirements
2 Review progress against own targets	2.1 Identify an appropriate review point 2.2 Review own progress with an appropriate person 2.3 Discuss and agree with an appropriate person what has been achieved and what, if anything, is still to be achieved

## Unit content

---

### 1 Understand how to develop and confirm personal targets

*Developing personal targets:* should be appropriate in a number of aspects eg motivates the individual, relevant to job role and team goals or company goals, clarifies individual's aim, may benefit others as well as the individual, may be a step towards other goals for the future (if appropriate); recorded in appropriate format eg setting series of manageable steps towards reaching a target and investigating resources/support needed to reach the target

*Relating team or organisational targets to personal targets:* personal targets should be in line with targets of a team or wider organisation; goal of the team/organisation should be linked to the goal of the individual; reaching individual targets should have benefits for individual and team or wider organisation

*Presenting personal targets in line with organisational requirements:* using appropriate documents and procedures eg appraisal documents, target setting forms, informal meeting with line manager; following specific guidelines or instructions of organisation/department when using target documents and procedures eg appropriate language and terminology to fill in forms, write up notes after meeting with line manager, submit target document for sign-off by the agreed date

### 2 Review progress against own targets

*When to review progress achieved:* identify appropriate time to review progress eg mid-way through task/assignment, at the end of task or assignment, during scheduled performance review with line manager

*Reviewing progress achieved:* using relevant method and evidence to show what progress has been made eg using feedback from line manager and customers to gather evidence for personal conduct targets, using call log records to complete call centre target sheet; if target consists of a stepped approach, identifying which steps have been taken towards the target; relevance/appropriateness of the personal targets eg considering whether progress achieved has benefited the learner, the team/organisation or both

*Progress still to be achieved:* identifying and reviewing any aspect of the target still to be achieved; checking if the original target has changed in the light of the review and, if so, whether this affects the progress still to be achieved

## Essential guidance for tutors

---

### Delivery

A workplace setting or a non-workplace environment would be appropriate for delivery of this unit. The opportunity to draw on real life scenarios and examples is inherent in each learning outcome and should be fully utilised by the tutor/line manager. These could be supported by assessment activities that are as practical and current as possible.

The unit focuses on the learner being able to develop personal targets which relate to wider team or organisational targets. They therefore, require real life or simulated opportunities to prepare, agree, present and review their personal targets in a format appropriate for a workplace situation. Examples of targets appropriate for a workplace situation are wide ranging and could include personal learning, training or qualification targets that are likely to enhance individual or group performance in the workplace.

Where the assessment criteria indicate that it is appropriate for the tutor to provide background information or a degree of support to the learner, a wide range of resources may be drawn upon, for example interviews with human resources staff or line managers, role-plays, group discussions, presentations and case studies on target setting in real life organisations, websites.

Group discussions and input from visiting speakers could be used to help learners think about how and why personal targets are set in the workplace. Answers could then be collated on a board or flipchart.

For learning outcome 2, learners should be encouraged to think about the wider implications of their review, for example how do their achievements reflect on the achievement of team targets? It is also important for them to think about whether the target is still current or whether it needs to be revised.

### Assessment

To achieve 1.1, the learner must set at least two personal targets that are appropriate for a real or simulated workplace situation. Where the learner is not in the workplace, they may develop personal learning targets which relate to a wider set of objectives that would be useful for the workplace (for example a qualification or learning programme). Some general support may be given to the learner in developing their targets, but the learner must be able to participate fully in any discussion and make an independent decision on the appropriateness of the target.

For 1.2, the learner needs to show that their personal targets are linked to team or organisational targets. The targets may be simulated or drawn from an actual workplace. Although tutors/line managers may wish to provide general information about the targets to be set, the learner must be able to identify independently how the information relates to their own objectives and those of their team or organisation.

To achieve 1.3, the learner needs to discuss and confirm their personal targets with an appropriate person such as a tutor, line manager or other appropriate colleague.

1.4 requires the learner to present their personal targets in a way which is suitable and appropriate for their workplace, for example using the appropriate documentation and language to describe the targets. It is not necessary for the learner to record their targets using formal documentation unless it is appropriate and useful to do so (for example the learner is in the workplace and undertaking a review of their objectives using formal documentation provided by the employer). Alternative methods may be used to evidence the learner's target for example a presentation, chart, poster, written statement provided by the learner, with supporting notes from the tutor/line manager. Where the learner is not in the workplace, they can agree an appropriate format with their tutor to satisfy the requirements of 1.4 (for example using forms or documents from the school, college or place of learning relating to the setting of personal learning targets).

For 2.1, the learner needs to decide when would be an appropriate time to review their personal targets. This may be at the end of a project or task, at the formal appraisal time or at a time agreed between the learner and their tutor/line manager or work colleague. The learner should be aware that the review will need to show that they have made some progress so they should plan the time of the review accordingly. The tutor/line manager may offer some general support to the learner in thinking about the appropriate time for a review, but the learner must make an independent decision about the most appropriate time for the review.

For 2.2, the learner should review their progress through discussion with an appropriate person such as a line manager, supervisor or tutor. Where the learner is in the workplace, the review should be carried out in accordance with the relevant procedures and documents for that workplace. Where the learner is not in the workplace, and is reviewing personal learning targets (as described in assessment of 1.1 above), the review will need to be in line with documents and procedures for the place of learning (for example school or college).

In order to achieve 2.3, the learner must be able to express what they feel has been achieved towards the target and what, if anything, still needs to be done. It is not essential for the learner to have completed all the steps needed to achieve the target but, if there is still further progress to be made towards the target, the learner should be able to confirm whether or not the original target is still relevant and appropriate to carry forward, clarify the next steps and record these in an appropriate format.

Evidence for 2.2 and 2.3 does not need to be recorded on formal workplace documentation unless it is appropriate and useful to do so. Appropriate alternative methods may be used for example a presentation, chart, poster, written statement provided by the learner, with supporting notes from the tutor/line manager, evidence from tutorials or taped discussions verified by the tutor/line manager.

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

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

Entry Level	Level 1	Level 2
Unit 16: Setting and Meeting Targets at Work	Unit 23: Setting and Meeting Targets at Work	Unit 9: Self-assessment
Unit 10: Self-assessment	Unit 10: Self-assessment	Unit 10: Career Progression
Unit 11: Career Progression	Unit 11: Career Progression	

## Essential resources

Learners need access to appropriate information about how to identify, set and review targets.

### Websites

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

[www.lifecoachexpert.co.uk](http://www.lifecoachexpert.co.uk)

[www.projectsart.co.uk/smart.html](http://www.projectsart.co.uk/smart.html)



## Unit 23: Solving Work-related Problems

QCF Level: Level 2

Credit value: 2

Guided learning hours: 20

---

### Unit abstract

Problem-solving skills are highly sought after by most employers. The aim of this unit is for learners to be able to apply problem-solving skills to situations that arise at work. The learner will consider common types of problems in the workplace, the reasons why problems may be encountered and learn how to use sources of help effectively. They will learn how to find sources of help in problem solving. They will also evaluate possible solutions, and plan and apply appropriate solutions to work-related problems.

### Learning outcomes and assessment criteria

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

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Understand that both individuals and organisations encounter workplace problems	1.1 Explain the main reasons that individuals encounter problems in the workplace 1.2 Describe some of the common types of problems that an organisation or company might need to solve
2 Use sources of help effectively	2.1 Explain how sources of help available to both individuals and to organisations can help in solving work-related problems 2.2 Extract relevant information or advice from several different sources to help solve workplace problems
3 Consider possible solutions to workplace problems	3.1 Describe possible solutions to different workplace problems 3.2 Rank the solutions to problems according to their likely effectiveness, providing explanations for the rank order

Learning outcomes	Assessment criteria
The learner will:	The learner can:
4 Apply appropriate strategies to solve workplace problems	4.1 Plan how to execute the solutions they consider most likely to work

## Unit content

---

### 1 Understand that both individuals and organisations encounter workplace problems

*Individual problems:* conflict or differences of opinion; new situations or change in current situation; communication difficulties and misunderstandings

*Problems of companies or organisations:* how to increase profits, how to reorganise a team or division, how to market a product, how to meet new legal requirements, how to recruit suitable staff

### 2 Use sources of help effectively

*Sources of help for individuals:* colleagues, managers, supervisors, workplace procedure manuals, training manuals, staff handbook, posters, leaflets, instruction manuals, human resources manager, complaints policy, union representative

*Sources of help for organisations or companies:* internet, training, consultants, experts, advisory organisations

### 3 Consider possible solutions to workplace problems

*Solutions to workplace problems:* eg meet with union representative to discuss pay and conditions, update staff manual to reflect recent changes in working conditions, consult staff about revised rotas

*Ranking solutions according to likely effectiveness:* factors to consider when ranking possible solutions eg timeframe and resources needed, cost implications, short-term versus long-term solution, probability of solving whole or part of the problem

### 4 Apply appropriate strategies to solve workplace problems

*Problem-solving strategies:* find out all information required; use all sources of help; consider all possible solutions; consider options of different approaches eg advantages and disadvantages of possible solutions

*Applying problem solving strategies:* make informed decision after considering all relevant information; choose course of action, amend action if necessary; review effectiveness of strategy

## Essential guidance for tutors

---

### Delivery

Delivery methods could include learner-centred tasks such as group work and research tasks and learner-led presentations. As many practical activities should be included as possible to help learners relate to the unit content.

The tutor/line manager could start delivery of this unit by inviting guest speakers from different organisations, or different departments within an organisation, to discuss the problems organisations may encounter. Learners could prepare questions for the speakers beforehand.

The main reasons that individuals encounter problems in the workplace could be explored through the use of different case studies (for example written or audio-visual). Appropriate clips from films or TV programmes could also be used. Learners could work in small groups and present their findings to the whole group.

Learners could work independently to explore sources of help for specific workplace problems. This research could include visits to specific kinds of workplaces or different departments within a workplace. Learners could create a guidelines sheet to include relevant information or advice from several different sources to help solve workplace problems. The guidelines sheet could function as a factsheet for other learners to follow for learning outcome 2.

For learning outcome 3, learners should use different methods to arrive at possible solutions, for example group discussion, research and investigation and scenario-modelling could be used to identify a range of possible solutions to workplace problems. In particular, at this level, it is important for them to try to think through what might happen if they were to apply a particular strategy, in addition to using information or advice gained from the sources of help that they have used.

In groups, learners could discuss appropriate strategies for different workplace problems and report back to the rest of the group. Learners need to work towards planning their own strategies for solving workplace problems for learning outcome 4.

### Assessment

For 1.1, the learner must explain three reasons why individuals encounter problems in the workplace.

1.2 requires the learner to describe some of the common types of problem that an organisation or company might need to solve. At least two different types of problems must be described.

To achieve 2.1, the learner will need to explain how two different sources of help can aid individuals and how two different sources of help will assist organisations to solve work-related problems.

The evidence for 1.2, 3.1, 3.2 and 4.1 could be presented in a leaflet or as a poster. Alternative methods of evidencing learning may be used.

For 2.2, the learner needs to find out relevant information or advice to help them solve two identified workplace problems. Advice should be obtained or extracted from more than one source of information.

To achieve 3.1, the learner must describe appropriate solutions to the two different workplace problems identified in 1.2. The learner's descriptions should show that they have taken on board or thought about the advice or guidance they found in the various sources referred to in 2.2.

3.2 requires the learner to indicate the effectiveness of the solutions to the two problems given in 3.1. The learner will need to show an ability to evaluate the effectiveness of each solution by placing them in rank order. Explanations for the chosen order will also need to be given.

4.1 requires the learner to produce two brief plans: one plan for each of the highest-ranked solutions for 3.1. The plans should indicate the steps to be taken to solve the problems. The steps should be appropriate to the nature of the problem and ordered in a logical way. The plans need not be complex or lengthy.

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

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

Entry Level	Level 1	Level 2
Unit 17: Solving Work-related Problems	Unit 15: Communicating Solutions to Others	Unit 14: Communicating Solutions to Others
	Unit 24: Solving Work-related Problems	

### Essential resources

Learners will need access to appropriate sources of information about workplace problems and how to solve them.

### Websites

[www.direct.gov.uk/en/Employment/Employees/index.htm](http://www.direct.gov.uk/en/Employment/Employees/index.htm)

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

[www.lifecoachexpert.co.uk](http://www.lifecoachexpert.co.uk)

[www.monster.co.uk](http://www.monster.co.uk)



## Unit 24: Summarising Documents

QCF Level: Level 2

Credit value: 1

Guided learning hours: 10

---

### Unit abstract

Summarising the content of different types of documents is a skill that is used in many job roles.

Learners undertaking further study will also need these skills particularly when reading text. Throughout delivery of this unit, the learner will gain experience of reading and summarising a range of texts that have been written with different audiences and purposes in mind. Learners will find out the importance of accuracy and appropriate presentation in summarising documents; they will also have the opportunity to demonstrate these skills.

### Learning outcomes and assessment criteria

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

Learning outcomes	Assessment criteria
<b>The learner will:</b>	<b>The learner can:</b>
1 Be able to distinguish between the key points and supporting detail in documents of several pages	1.1 Extract the key points from a document of several pages
2 Understand that the intended purpose and audience for a summary should influence the way in which it is written	2.1 Explain how summaries can be written and presented differently according to purpose and audience

Learning outcomes	Assessment criteria
The learner will:	The learner can:
<p>3 Be able to summarise the key points of documents of several pages in a way that is consistent with the intended purpose and audience</p>	<p>3.1 Produce a summary which:</p> <ul style="list-style-type: none"> <li>• captures the key points of a document accurately</li> <li>• is presented in a format and uses language appropriate for the intended purpose and audience</li> <li>• has been proofread and edited for accuracy</li> </ul>

## Unit content

---

**1 Be able to distinguish between the key points and supporting detail in documents of several pages**

*Extracting the key points from a document:* strategies eg bold, capitals, bullet points, italics, different coloured fonts; extract points eg by highlight, underline, notes, mind map

**2 Understand that the intended purpose and audience for a summary should influence the way in which it is written**

*Summary written for particular audience and purpose:* language used; simple and more complex sentences; presentation of information eg text, text and diagrams, mind maps, charts

*Audience:* eg customer, staff within an organisation, line manager, general public, child, adult

*Purpose:* eg instruction document, report, promotional document, media article

**3 Be able to summarise the key points of documents of several pages in a way that is consistent with the intended purpose and audience**

*Key points:* all key/vital information needs to be included in the summary text

*Appropriate format and language:* presentation style depends on audience and purpose of summary; appropriate language for intended audience and purpose eg formal or informal

*Proofreading and editing:* using spellcheck software for electronic documents; asking colleague to check the summary for accuracy and appropriateness

## Essential guidance for tutors

---

### Delivery

Learners should be given the opportunity to summarise a range of documents consisting of several pages. These could be brochures, leaflets or booklets, web pages on a work-related topic, pages from a textbook, an instruction manual or training guide. Learners are likely to need support in being shown how to extract key points from the document. The level of reading required for the document could be lower than the learner's own reading skills to allow them to gain the necessary summarising skills.

To help the learner understand how summaries are written for different audiences and for different purposes, they could produce different forms of text, for example a poster for children, a leaflet for employees to promote health and safety, a report for a manager. Alternatively, the same theme may be presented using different language styles. This practical approach will help the learner understand the learning outcome.

Learning outcome 3 requires the learner to combine all their skills to produce an accurate summary. To help the learner gain these skills, they could be given short summaries to discuss, proofread and edit. They could also complete a list of commonly misspelled words and incorrect punctuation for example apostrophes.

### Assessment

This unit may be assessed through the use of one assessment method which allows the learner to demonstrate competence for each criterion. Alternatively, individual tasks may be used.

In order to achieve 1.1, the learner must demonstrate that they can extract the key points from a document of several pages. They need to be able to show that they understand what the document is about.

For 2.1, the learner may explain to their assessor, or provide a written/word processed document, of how summaries are written for different audiences and purposes. Their answer needs to include the use of language, presentation style and structure of content.

For 3.1, the learner must be able to produce a summary of a document. The original document should be several pages long. The summary produced by the learner needs to capture the key points of the document accurately, and be presented in a format and language appropriate for the intended purpose and audience. The learner must show that they have proofread their summary and edited it for accuracy.

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

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

Entry Level	Level 1	Level 2
Unit 18: Presenting Accurate Documents	Unit 25: Taking Notes at Meetings	Unit 25: Contributing to Meetings
	Unit 26: Summarising Documents	
	Unit 27: Contributing to Meetings	

## Essential resources

Learners will need access to appropriate items for summarising.

## Websites

[http://library.thinkquest.org/J001156/forms%20of%20writing/bc\\_summary.htm](http://library.thinkquest.org/J001156/forms%20of%20writing/bc_summary.htm)

[www.mantex.co.uk/download.htm](http://www.mantex.co.uk/download.htm)



## Unit 25: Contributing to Meetings

QCF Level: Level 2

Credit value: 1

Guided learning hours: 10

---

### Unit abstract

Making an effective contribution at a meeting can make an employee feel valued, increase their knowledge of the job, improve their confidence and develop their communication skills.

This unit has been designed to help the learner understand the key aspects of meetings. This includes initial preparation, their role during the meeting and follow-up procedures. Information given will include the importance of liaising with other colleagues, preparing the agenda and collating relevant documents. The learner will also develop their own ways of recording information during the meeting to help them follow the thread of the discussion.

The unit gives the learner the opportunity to develop the skills of preparing an agenda item, presenting the information and answering questions. They will also experience the challenge of reaching a decision.

### Learning outcomes and assessment criteria

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

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Know key aspects of meetings	1.1 Describe key aspects of the meeting process and procedures
2 Know solutions to common meeting problems	2.1 Describe appropriate solutions to common meeting problems
3 Be able to contribute to the discussion at a meeting	3.1 Record personal notes from the meeting 3.2 Contribute relevant ideas and opinions which help move the discussion forward and build appropriately on what has already been said at the meeting

Learning outcomes	Assessment criteria
The learner will:	The learner can:
4 Be able to take responsibility for an agenda item at a meeting	4.1 Present an agenda item at a meeting 4.2 Answer questions to help move the discussion forward and reach decisions

## Unit content

---

### 1 Know key aspects of meetings

*Key aspects of the meeting process and procedures:* prior to meeting eg arranging date and venue, sending invitations to delegates, liaising with chairperson on agenda and other documents, arranging refreshments, booking equipment if necessary; at meeting eg ensuring room layout is appropriate, booked equipment is available, spare agendas and documents available, taking notes or minutes, meeting etiquette eg using correct type of language, allowing others to speak uninterrupted, being polite in challenging views of others; after the meeting eg ensuring the room is left tidy, removing all spare documents, typing up notes/minutes if required, sending notes/minutes to relevant people

### 2 Know solutions to common meeting problems

*Common meeting problems:* delegates turning up late or not at all, delegates being unprepared for the meeting, copies of agenda and notes not reaching relevant people by email or post, problems with meeting venue or meeting room equipment, someone dominating or obstructing the discussion, agenda too large, conflict between delegates, irrelevant discussion or questions raised

*Appropriate solutions to common meeting problems:* contacting delegates before the meeting to check whether agenda, notes and venue details have been received, re-confirming meeting room arrangements and equipment requirements before the day of the meeting, introducing a rota or time limit on individual contributions to prevent a few people dominating the discussion, referring an irrelevant question or agenda item to a different meeting or time for discussion

### 3 Be able to contribute to the discussion at a meeting

*Recording the meeting:* note taking; minute taking; use of voice recorders

*Presentation:* audience; purpose of presentation; PowerPoint; clarity of information; knowledge of subject; respond to questions

*Contribute:* listen to complex information; respond appropriately; decision making

#### 4 Be able to take responsibility for an agenda item at a meeting

*Present an agenda item at a meeting:* prepare relevant, accurate information; present information appropriately and effectively; lead discussion of an agenda item

*Answer questions to help move the discussion forward and reach decisions:* answering questions politely and accurately, giving an answer which provides the information needed to help make a decision, referring a question to someone else if they are better able to provide an answer, asking for clarification if the question is unclear, being honest and tactful if the answer to the question is unknown, inviting other delegates to contribute answers or opinions regarding the question asked

## Essential guidance for tutors

---

### Delivery

This unit is essentially a practical unit which gives the learner the opportunity to practise the skills required for arranging and contributing to meetings.

Learners will need to know the protocols for arranging a meeting, namely what happens prior to a meeting, what happens during a meeting and the work that is undertaken after the meeting. They will also need to know the importance of liaising closely with the chairperson when compiling the agenda, ensuring the appropriate delegates are invited and the relevant documents are available for delegates. To assist learners in this, speakers could be invited to share their experiences of arranging and/or chairing meetings.

Learners will benefit from the opportunity to arrange meetings either in a place of learning or in the workplace, where possible. This may be done in class time or during the working day for example a meeting to discuss a school or college issue or a meeting to discuss arranging a charity event. The meeting may only have one or two agenda items but the principles will be the same as those for larger, more formal meetings.

It is important that learners understand what topics are likely to be covered under each agenda item. They should understand why they are attending the meeting (for example to get an update, to raise an issue on behalf of a team or for themselves, to present a brief item) and what they are planning to achieve by attending (for example to tell other team members about a piece of work they are doing, to get an answer to a question, to find something out.)

It would be helpful for learners to think about how to deal with common problems that might arise in relation to preparing for and conducting meetings such as people turning up late, problems with venue or meeting room equipment, a delegate dominating a discussion or raising irrelevant issues. Film or TV clips of meeting scenes could be used as a way of starting off a group discussion on potential meeting problems and how they could be solved. Alternatively, the group could be presented with examples of solutions to common meeting problems and discuss whether or not the proposed solutions would be effective and appropriate.

The unit also focuses on the learner's ability to present information at a meeting. This may or may not include the use of electronic equipment. Learners could be given the opportunity to prepare a visual presentation and deliver it as part of an agenda item. Time could be spent ensuring that the learner can set up the equipment necessary for visual presentations. They should also be aware of how to access technical support if needed.

When contributing to meetings, the learner should be able to move discussions forward by avoiding repetition and suggesting new ideas. They should ask questions that help clarify what has already been said. They will need to know how to adapt their contributions in terms of tone, language and content according to the nature and purpose of the meeting. The sophistication of their contributions should be consistent with the expectations of the English functional skills standards at this level.

## Assessment

In order to achieve 1.1, the learner must provide a description of the process involved in arranging a meeting. The learner could provide the information in the form of guidelines for a member of staff who is arranging a meeting for the first time. This approach would ensure that the description includes the relevant stages involved in the process.

For 2.1, the learner must describe at least two appropriate solutions to one common meeting problem. Alternatively, they may describe two different meeting problems and suggest one solution for each problem. The solutions put forward need not be detailed or lengthy.

Taking notes at a meeting is an important personal record of the discussions and decisions made. A learner is not required to take formal minutes of the meeting in order to achieve 3.1. However, they are required to take personal notes. These notes must demonstrate their understanding of the purpose of the meeting, the key discussion points and the decisions and/or action points that were agreed. Voice recorders may be used to help the learner make their notes.

When attending meetings, it is important to have the confidence and subject knowledge to make an appropriate contribution to the discussion. For 3.2, the learner should be observed participating in a meeting. At least two examples are required of an appropriate opinion, idea, comment or suggestion made to the discussion. A witness statement may be provided. Evidence must be available for internal and external verification purposes.

In order to achieve 4.1, the learner must present a straightforward agenda item at a meeting. Presentation of the agenda item may be supported with visual aids, but this is not a requirement. The emphasis is on the learner taking the lead in presenting the agenda item and being able to deliver the relevant information effectively. Additionally, the learner needs to demonstrate their knowledge of the subject area covered by the agenda item and be able to express their opinion clearly. The learner may be able to achieve 4.2 if they can answer questions on their agenda item confidently and appropriately, including re-directing questions to more appropriate persons if necessary. Alternatively, 4.2 may be assessed when the learner is participating in other meetings. Evidence must be available for internal and external verification purposes.

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

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

Entry Level	Level 1
Unit 18: Presenting Accurate Documents	Unit 25: Taking Notes at Meetings
Unit 19: Speaking Confidently at Work	Unit 27: Contributing to Meetings

## Essential resources

There are no essential resources required for this unit.

## Websites

[www.businessballs.com/meetings.htm](http://www.businessballs.com/meetings.htm)

[www.effectivemeetings.com/meetingbasics/6tips.asp](http://www.effectivemeetings.com/meetingbasics/6tips.asp)

[www.meetings.org/meeting4.htm](http://www.meetings.org/meeting4.htm)



## Unit 26: Preparing for Work Placement

QCF Level: 2

Credit value: 1

Guided learning hours: 10

---

### Unit abstract

Attending a work placement will give the learner the opportunity to experience a work setting. They will find out about the roles and responsibilities of individual employees, specific types of careers and general workplace skills. However, if the learner is not prepared for the work placement, and does not know what they expect to learn, then this valuable experience may not reach its full potential.

The unit will help the learner find out, prior to starting their work placement, about the company or organisation where they are going to be working. It will also raise their awareness of the skills and knowledge that they already have and could use during the work placement. The learner will find out how to set goals which meet their employer's expectations. All these skills will be crucial when learners begin the job seeking process.

Although the term 'company or organisation' has been used throughout this unit, it can refer to any type of work placement for which the learner may be preparing.

### Learning outcomes and assessment criteria

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

Learning outcomes		Assessment criteria	
The learner will:		The learner can:	
1	Understand the company or organisation where they plan to do the work placement	1.1	Explain key information about the company or organisation providing the work placement and where this information was obtained
2	Understand information they need before starting work placement	2.1	Explain the terms and conditions of the work placement
		2.2	Explain the tasks they would need to perform as part of the work placement

Learning outcomes		Assessment criteria	
The learner will:		The learner can:	
3	Understand what the company or organisation expects of the learner during the work placement	3.1	Explain why workplace values are important for success at the work placement
		3.2	Describe personal presentation requirements appropriate to the work placement
		3.3	Explain how they could deal effectively with situations of emotional stress, difficulty or confusion during the work placement
4	Be able to set goals for the work placement, including skills development	4.1	Set specific, realistic goals for the work placement, including a goal that relates to skills development

## Unit content

---

### 1 Understand the company or organisation where they plan to do the work placement

*Information about the company/organisation:* type of company or organisation; ownership eg public or private; function eg service provision, retail, construction, logistics, administrative; location; size eg small, large, number of employees, number of departments, international, national or local organisation; internal and external customers

*Sources of information:* eg company leaflets or brochures, company or organisation website, newspaper, magazine or internet articles about company or organisation, Connexions, Jobcentre Plus, learners who have previously been on work placement at the same company or organisation, staff from the company or organisation, conversation or correspondence with company or organisation providing the work placement

### 2 Understand information they need before starting work placement

*Terms and conditions of work:* hours of work; absence procedures; dress code; line manager or supervisor; health and safety responsibilities eg evacuation procedures, first aid procedures, reporting hazards; refreshment facilities; seeking advice relating to work and/or colleague relationships

*Tasks:* daily routine tasks eg opening post, taking messages, checking emails, checking equipment for health and safety purposes, setting up equipment, liaising with line manager; project work

### **3 Understand what the company or organisation expects of the learner during the work placement**

*Workplace values:* definition of values eg concepts and ideas that lead to workplace satisfaction; different types of values eg place customer service at heart of business, produce quality products, celebrate diversity, promote mutual respect, encourage creativity, recognise and reward achievement and good work

*Importance of workplace values in a work placement:* helps learner understand what is expected of them by employer and helps in meeting those expectations eg how to treat other staff and customers appropriately, how to do job to a high standard, how to prioritise daily tasks, how to make decisions

*Personal presentation:* appropriate clothing for job role; personal hygiene; attitudes and behaviours; body language

*Dealing effectively with situations of emotional stress, difficulty or confusion:* use appropriate sources of support and guidance in situations of emotional stress eg speak to work placement supervisor if there are difficulties in getting along with another colleague, ask questions or request clarification if instructions or messages are unclear or confusing, ask for help or guidance from other people if a task is difficult or unclear, consult user guides or request further training and assistance if nervous about using a new piece of equipment

### **4 Be able to set goals for the work placement, including skills development**

*Goal setting for the work placement:* different types of goals eg personal goals, work-related goals, skills development; goals for the work placement should be in line with employer's expectations for the work placement; setting a goal that draws on current skill or knowledge, or on skills and knowledge the learner would like to acquire

## Essential guidance for tutors

---

### Delivery

Although each learner will be attending a different work setting, the principles behind preparing for the work placement will be the same. Before starting to find out about their work placement, learners could discuss what information they need to know about the organisation in which they are going to be working. A checklist could be compiled by learners to help direct their research. Learners could collect information on aspects such as the function of the organisation, its structure (if relevant) and types of customers. Information may also be gathered from the internet and visits to the careers office to find out about the organisation providing the work placement.

To help the learner understand the concept of ‘terms and conditions’ of work, they could undertake a comparison of different terms and conditions of work to identify the common elements. Although some aspects will not be relevant for work placement (for example annual leave entitlement) learners should be able to identify those terms and conditions that are relevant for example dress code, absence notification, hours of work.

Learners will need to extract the relevant details about the main tasks relating to the job role or main areas of learning at the company or organisation. This could be done from leaflets or marketing brochures for the organisation, visits to the careers office and/or tutor-led group discussions. Ideally, the learner will have an interview with the employer prior to starting the work placement. This would provide them with an opportunity to find out about the tasks they will be expected to undertake. Alternatively, learners who have previously participated in the same or similar work placement could be asked to speak to learners in small groups.

It would be useful for tutors to stress the importance of workplace values and rules and the possible skills or qualities needed to satisfy the requirements of the work placement. To help learners understand the concept of ‘workplace values’, they could think about their own values for example honesty, being trustworthy, respect for others. This could then be translated into the workplace situation and how it relates to day-to-day working and enhances the chances of a successful work placement experience.

Employers could be invited as guest speakers to discuss expectations of learners during work placement. It is important that learners are given the opportunity to discuss these qualities and expectations so that they can identify a range of possible skills and goals to aim for. These should be linked to their course requirements or career ideas, in order to help them get the most out of their time on work experience.

Learners going into a work placement might feel nervous and concerned that they will appear incompetent or will not be able to do what they are asked to do. It would, therefore, be beneficial to prepare learners to deal effectively with any potential feelings of stress or confusion. For example, a group discussion or role-play activity could be used to explore different types of stressful, confusing or difficult situations in a work placement; it could also assist learners in developing skill and confidence in asking appropriate questions or asking others for help and guidance.

Alternatively, learners could watch a TV or film clip that depicts a stressful or confusing scene in the workplace and then hold a group discussion about what could be done to resolve the stress, difficulty or confusion in that scenario. This could help address learners' fears and concerns about handling any uncertain or difficult situations they may encounter.

Learners may discuss possible work placement goals in group situations and/or individually with tutor or careers advisors, but should be encouraged to come up with their own final action plan, identifying personal targets and opportunities for the development of skills or knowledge from the placement. Time will need to be spent helping learners produce relevant and realistic goals which are relevant to their situation.

## **Assessment**

In order to achieve 1.1, the learner must explain key information about their proposed work placement and where this information was obtained. This explanation needs to provide information on the type, size and purpose of the organisation, the organisational structure and its internal and external customers (if relevant).

2.1 requires the learner to explain the terms and conditions of work that are relevant to their work placement. Information could include details such as hours of work, dress code, number of days attending work placement, breaks, absence procedures.

2.2 requires the learner to explain the tasks that they are likely to do during work placement. This explanation should provide detailed information for each task and should not simply be a list. Details could include information on the procedures to be followed, health and safety issues, quality checking processes for example check work has been completed to a satisfactory standard by the line manager, timescales (if relevant).

To achieve 3.1, the learner must be able to explain the importance of at least two workplace values and why they are important to a work placement experience. Part of this explanation should demonstrate the learner's understanding of what workplace values are.

Evidence of understanding for 3.2 could be included as part of 3.1. The learner must describe at least two personal presentation requirements for the upcoming work placement.

For 3.3, the learner needs to provide two examples of situations in the workplace where they might encounter stress, difficulty or confusion. For each example, they must explain at least one positive action they could take to help resolve the stress, difficulty or confusion. The learner's explanation of the positive action must be appropriate and relevant to the nature of the stressful, difficult or confusing situation they have given as an example.

For 4.1, the learner must demonstrate their ability to set specific, realistic goals for the work placement. The learner needs to provide four goals, one of which must be related to skills development. The skills development goal may relate to an existing skill which the learner would like to use during the work placement, or to a new skill the learner would like to acquire during the work placement.

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

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

Entry Level	Level 1	Level 2
Unit 9: Self-management Skills	Unit 9: Self-management Skills	Unit 8: Self-management Skills
Unit 10: Self-assessment	Unit 10: Self-assessment	Unit 9: Self-assessment
Unit 12: Conduct at Work	Unit 16: Positive Attitudes and Behaviours at Work	Unit 15: Effectiveness at Work
Unit 14: Investigating Rights and Responsibilities at Work	Unit 21: Investigating Rights and Responsibilities at Work	Unit 20: Investigating Rights and Responsibilities at Work
Unit 15: Managing Your Health at Work	Unit 22: Managing Your Health at Work	Unit 21: Managing Your Health at Work
Unit 20: Preparing for Work Placement	Unit 28: Preparing for Work Placement	Unit 28: Planning an Enterprise Activity
Unit 21: Learning from Work Placement	Unit 29: Learning from Work Placement	
Unit 22: Safe Learning in the Workplace	Unit 30: Safe Learning in the Workplace	
Unit 23: Planning an Enterprise Activity		

### Essential resources

In order to make this unit relevant, the learner must be preparing to go on a suitable work placement. Employers must also be prepared for the upcoming work placement and support the learner in gathering relevant information.

### Websites

<http://morethanwork.net>

[www.need2know.co.uk](http://www.need2know.co.uk)

[www.projectsmart.co.uk/smart-goals.html](http://www.projectsmart.co.uk/smart-goals.html)

[www.qmr.com/products/adventure/docs/workbook/chapter4.asp](http://www.qmr.com/products/adventure/docs/workbook/chapter4.asp)

[www.trident-edexcel.co.uk](http://www.trident-edexcel.co.uk)

[www.work-experience.org](http://www.work-experience.org)



## Unit 27: Learning from Work Placement

QCF Level: Level 2

Credit value: 2

Guided learning hours: 10

---

### Unit abstract

Work placement can be a valuable experience for all learners. It can help them develop new skills and increase their knowledge of a vocational area. However, in order to achieve this, the learner must be able to reflect on what they have learned and use that learning for future development and goal setting. Although this unit has been designed to be used after a learner has experienced a work placement, they will need to have gathered evidence during their work placement which they can apply in carrying out the requirements of the unit.

### Learning outcomes and assessment criteria

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

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Be able to present evidence of learning gained from tasks undertaken during the work placement	1.1 Show evidence that explains the learning gained from tasks undertaken during the work placement
2 Understand what skills were used or gained during the work placement	2.1 Explain how they used their strengths or skills during the work placement and where they experienced challenges
3 Understand aspects of the work placement that could have been improved	3.1 Explain any aspect of the work placement experience that could have been improved and how it could have been improved
4 Be able to use learning from the work placement to set career-related goals	4.1 Describe how the work placement experience might assist them in making choices about a future career 4.2 Set short- term and long-term goals which build on their learning from the work placement

## Unit content

---

### 1 Be able to present evidence of learning gained from tasks undertaken during the work placement

*Evidence of tasks undertaken:* employer reference, tutor report, description of tasks undertaken, video log, reports, minutes of meetings attended

*Presenting evidence:* methods eg portfolio, CD, video, handwritten, electronic, word processed; verbal and written presentations; informal and formal presentations

*Explaining learning gained from tasks undertaken:* what was learned from specific work placement tasks, when this was learned, how it was learned, how it can be evidenced

### 2 Understand what skills were used or gained during the work placement

*Strengths and skills:* personal skills eg self-management, teamwork, business and customer awareness, communication; prior knowledge and experience eg hobbies, interests, previous work experience, knowledge gained in school or college subjects; personal qualities eg enthusiasm, patience, confidence, curiosity

*Challenges:* learning new skills, retaining information, establishing relationships with other people, prioritising tasks, asking others for help

### 3 Understand aspects of the work placement that could have been improved

*Aspects that could have been improved:* eg additional learning or experience of a particular task, practise certain skills before undertaking work placement, communicating more effectively with supervisor, managing time more efficiently

### 4 Be able to use learning from the work placement to set career-related goals

*Making choices about a future career as a result of work placement:* eg knowledge of new vocational area or area of interest, confirming whether they do or do not wish to work in a particular sector or industry, awareness of personal skills, awareness of strengths and weaknesses, desire to find out further information about a particular career, industry or organisation

*Setting goals:* SMART goals; skills and knowledge development eg further study, investigate specific career options or work areas; employment opportunities or goals eg apply for full-time employment, seek voluntary work in a particular area

## Essential guidance for tutors

---

### Delivery

In order to achieve this unit, the learner must have experienced a work placement. The length of time spent in the work placement is not defined, however sufficient time must be given to allow the learner to achieve the assessment criteria.

The learner will be expected to have gathered evidence of the tasks or activities that they are involved in during their work placement. They will then be able to use the evidence gathered from the work placement to demonstrate competence for each assessment criterion. The learner is also expected to have gathered evidence of new skills or knowledge they have acquired as a result of various work placement tasks or activities. It would therefore be helpful for tutors to encourage learners to think about how they can show that they have gained new skills or knowledge from the tasks and activities.

Prior to starting the work placement, a group discussion may be used to identify different forms of evidence. This could include employer or tutor reports, evidence of work completed, descriptions of tasks or activities undertaken (perhaps in the form of a diary or minutes of meetings that the learner attended or facilitated). In this regard, the learner would need to adhere to the company policy on confidentiality and intellectual property.

Different methods of record keeping should be discussed. Examples of previous learner work could be shown. Paper-based and/or electronic record keeping methods may be used.

Learning outcome 2 focuses on the learner's skills, strengths and the challenges faced. The skills discussed should be based on the CBI employability competencies detailed in their *Time Well Spent* report found on the CBI website: [www.cbi.org.uk](http://www.cbi.org.uk).

The skills required for employability include self-management, teamworking, business and customer awareness, problem solving, communication, number and ICT skills. It would be appropriate to spend time discussing the meaning of these skills and how they relate to individual learners. Checklists could be developed which allow the learner to describe 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 have been improved, and how they could have been improved.

The learner also needs to consider their strengths based on their personal skills, knowledge and experience. One-to-one or small group discussions may be used to identify what the learner's strengths are. Alternatively, the learner may ask their employer to help them identify their strengths.

Small group discussions could be used to help the learner identify the challenges of the work placement. Record sheets may be developed to allow the learner to identify the challenges and then state how they overcame them.

In order to achieve learning outcome 3, the learner will need to know and understand what SMART goals are. This method of target setting is often used as part of performance development review processes and it is important for learners to understand how to set such goals. The acronym has a number of variations:

**S** – specific, significant, stretching

**M** – measurable, meaningful, motivational

**A** – agreed upon, attainable, achievable, acceptable, action-oriented

**R** – realistic, relevant, reasonable, rewarding, results-oriented

**T** – time-based, timely, tangible, trackable.

A useful website for more detailed information is  
[www.projectsmart.co.uk/smart-goals.html](http://www.projectsmart.co.uk/smart-goals.html)

### **Assessment**

In order to achieve 1.1, the learner must present evidence of tasks undertaken during the work placement and what was learned from these tasks. This evidence can then be used as a basis for the remaining assessment criteria. The evidence presented must show that the learner has learned something new, ie skills or knowledge. The learner needs to relate the development of the skill or knowledge to their specific experiences and completed work tasks. It is not sufficient for the learner to simply write a description of an activity or task undertaken. They must also be able to explain how they have evidenced that they have learned something new, for example checklist completed by work placement supervisor, witness statement, practical demonstration of a new skill.

For 2.1, the learner must explain how they used their strengths or skills and where they experienced challenges. (These could be strengths or skills which the learner had before the work placement or those which they acquired during the work placement.) This could be cross-referenced to the evidence provided for 1.1 or a separate explanation provided which highlights a range of strengths and challenges.

3.1 requires the learner to give an explanation of what could be improved and how it could be improved. This could be cross-referenced to the evidence provided in 1.1. Alternatively, a separate piece of work which is more generic, could be provided.

In 4.1, the learner needs to make straightforward value judgements on how their work placement has helped them in planning their career choices. The learner must make at least one suggestion regarding how the work placement experience has influenced their thinking about their future. The suggestion need not be lengthy or complex.

In achieving 4.2, the learner must set and produce appropriate evidence of two short-term and two long-term SMART goals as a result of what they have learned from their work placement. The method used to evidence the learner's goals may take the form of a log, presentation, poster, written statement provided by the learner (with supporting notes from the tutor) or other appropriate format.

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

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

Entry Level	Level 1	Level 2
Unit 9: Self-management Skills	Unit 9: Self-management Skills	Unit 8: Self-management Skills
Unit 10: Self-assessment	Unit 10: Self-assessment	Unit 9: Self-assessment
Unit 12: Conduct at Work	Unit 16: Positive Attitudes and Behaviours at Work	Unit 15: Effectiveness at Work
Unit 14: Investigating Rights and Responsibilities at Work	Unit 21: Investigating Rights and Responsibilities at Work	Unit 20: Investigating Rights and Responsibilities at Work
Unit 15: Managing Your Health at Work	Unit 22: Managing Your Health at Work	Unit 21: Managing Your Health at Work
Unit 20: Preparing for Work Placement	Unit 28: Preparing for Work Placement	Unit 26: Preparing for Work Placement
Unit 21: Learning from Work Placement	Unit 29: Learning from Work Placement	

### Essential resources

Learners will need to have undertaken a period of work experience.

### Websites

[www.direct.gov.uk/en/EducationAndLearning](http://www.direct.gov.uk/en/EducationAndLearning)

[www.work-experience.org](http://www.work-experience.org)



## Unit 28: Planning an Enterprise Activity

QCF Level: Level 2

Credit value: 1

Guided learning hours: 10

---

### Unit abstract

Enterprise activities offer opportunities to learn and develop the entrepreneurial characteristics of tenacity, independence, innovation, imagination, risk-taking, creativity, intuition and leadership. This unit aims to provide learners with a broad introduction for preparing to undertake an enterprise activity. The unit will help learners to find out and explain details of an enterprise idea, including understanding how to choose a viable enterprise activity, how to develop a product or service according to an implementation plan and how to assess some of the potential risks involved.

### Learning outcomes and assessment criteria

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

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Understand how to choose a viable enterprise activity	1.1 Describe key aspects of a viable product or service 1.2 Describe why people might want to buy their product or service
2 Draw up a plan for an enterprise activity	2.1 Prepare a plan for implementing an enterprise activity
3 Understand the risks involved in running the enterprise activity	3.1 Assess the main risks that may occur in implementing the enterprise activity

## Unit content

---

### 1 Understand how to choose a viable enterprise activity

*Key aspects of a viable product or service:* providing a product or service for which there is sufficient customer demand, product or service priced correctly, using appropriate promotional and sales strategies, high levels of customer care and satisfaction, sufficient financial, technical and human resources in place

*Possible customers:* having a clear idea of what the product or service is and what it will do or provide for the customer eg handmade gift wrap will provide customer with high quality, environmentally friendly, original product that is produced locally using recycled paper and non-toxic paints; linking the product or service to customer needs/wants eg people with busy schedules or a disability are likely to make use of dog walking service, people who are interested in fashion might wish to buy handmade jewellery

### 2 Draw up a plan for an enterprise activity

*Planning to implement the enterprise activity:* key activities needed eg administration, planning timelines, finance and budgeting, sales, promotion; practical/technical skills needed for making product or providing service; assessing own skills and knowledge; using past experience

### 3 Understand the risks involved in running the enterprise activity

*Assess main risks:* different types of risks eg lack of skills, competition from others, price of production, raising finance for start-up costs, weather, motivating group of helpers; factors that might lessen risks eg 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

## Essential guidance for tutors

---

### Delivery

This unit has been designed to make the key topics practically based wherever possible. Learners should be encouraged to gain an understanding of planning an enterprise activity in a highly applied way. Group working and group discussion would be appropriate, even where the learner's own assessment evidence needs to be recorded separately.

An enterprise activity does not have to be a large-scale activity. The activity can either be producing a product for example greeting cards or gift wrap, or providing a service for example selling ice cream or car washing. During delivery of this unit, learners should be given as much practical experience as possible.

To introduce the unit, tutors could stimulate group discussion as to what is required in order for an enterprise activity to be successful. Through the discussion, ideas could also be generated regarding different types of products and services and how they could be provided. It is important to emphasise that the activity must be possible within the learner's current skills. These ideas could be explored individually or through group activity.

It would be helpful if learners were given the opportunity to identify a range of different types of products and services before choosing which idea to pursue further in this unit. A question and answer session could determine the viability or appropriateness of different enterprise ideas. The strengths and weaknesses of the planned enterprise activity could also be explored through the form of a 'Dragons' Den' type of presentation to a group, with peers commenting on the ideas and whether or not they think customers are likely to buy the product or service.

Tutors could stimulate group discussion as to what is needed for the planning of a successful enterprise activity. A plan does not need to be as detailed as a business plan which would be considered as part of a business studies course at this level. However, materials produced for business start-ups could be a useful point of reference. A plan for this unit could cover a description of the product or service, how it will be provided, when and how it can be sold and what the likely demand might be.

A question and answer session could determine what should be included in the plan for the enterprise activity as well as the tasks that need to be done before they start trading. Business people or entrepreneurs could be invited to address the group on the subject of planning an enterprise activity. Alternatively, learners could interview business people that they know and report back to the group what they found out about enterprise planning.

It would be useful for learners to watch clips of TV adverts and/or review advertising from a range of newspapers and magazines to understand how to include promotion and selling in their enterprise plan. Information could also be gained from a range of other resources, including books, internet and media articles. Personal skills in selling and promoting could be observed through TV programmes such as *Dragons' Den*.

Learners could investigate the financial aspect of their chosen enterprise idea through active research on costs via the internet or interaction with possible suppliers. Setting prices could be a result of research (such as questionnaires or a small-scale focus discussion), exploring what prices customers are prepared to pay for a product or service and finding out from business people how to set realistic prices for a product or service.

An understanding of the possible risks could be understood through watching TV programmes such as *Dragons' Den* or making use of magazines and websites that provide information and advice for entrepreneurs.

### Assessment

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

To achieve 1.1, the learner must clearly describe their choice of product or service, what it will provide to the customer, and how it will be provided.

For 1.2, the learner needs to describe at least one type of customer who is likely to buy their product or service and explain why the customer is likely to buy the product or service.

To achieve 2.1, the learner must produce a plan for their chosen activity, including how the product will be produced or how the service will be run, when and how it can be sold and what the likely customer demand is. They will need to identify the tasks that need to be done before they start the enterprise activity, how long it will take to carry out the tasks and identify what materials they will need. Simple promotion and sales plans must be included and they must identify who they will need to help run the enterprise activity. The plan could be in the form of a written report, presentation, video clip or other appropriate format.

3.1 requires the learner to describe the key risks that could affect the success of their enterprise activity and offer at least one suggestion of a way that a risk could be reduced. This could be, for example, in the form of a presentation of a mind map, a written report or a 'risks log'. The number of potential risks will depend on the individual enterprise activity, but typically the learner should be able to identify at least two potential risks.

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

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

Entry Level	Level 1	Level 2
Unit 23: Planning an Enterprise Activity	Unit 31: Planning an Enterprise Activity	Unit 29: Running an Enterprise Activity
Unit 24: Running an Enterprise Activity	Unit 32: Running an Enterprise Activity	Unit 30: Producing a Product
Unit 25: Producing a Product	Unit 33: Producing a Product	

## **Essential resources**

No essential resources are required for this unit.

## **Websites**

[www.businesslink.gov.uk](http://www.businesslink.gov.uk)

[www.enterprise-education.org.uk](http://www.enterprise-education.org.uk)

[www.enterpriseinschools.org.uk/enterpriseinschools/index.php](http://www.enterpriseinschools.org.uk/enterpriseinschools/index.php)

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

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

[www.stridingout.co.uk](http://www.stridingout.co.uk)

[www.teachernet.gov.uk/teachingandlearning/14to19/ks4/enterpriseeducation](http://www.teachernet.gov.uk/teachingandlearning/14to19/ks4/enterpriseeducation)



## Unit 29: Running an Enterprise Activity

QCF Level: Level 2

Credit value: 1

Guided learning hours: 10

---

### Unit abstract

Enterprise activities offer opportunities to learn and develop the entrepreneurial characteristics of tenacity, independence, innovation, imagination, risk-taking, creativity, intuition and leadership. The aim of this unit is to provide learners with the opportunity to carry out an enterprise activity. This unit will help learners to understand the importance of having a strategy for an enterprise activity, dealing with money, sales techniques and customers correctly, as well as developing the ability to evaluate the success of their activity and review their personal involvement.

### Learning outcomes and assessment criteria

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

Learning outcomes	Assessment criteria
1 Be able to provide a strategy to ensure the success of an enterprise activity	1.1 Explain the features of an effective strategy to ensure success for their enterprise activity
2 Be able to complete an enterprise activity using appropriate skills and procedures	2.1 Demonstrate selling the product or service taking into account the practical and person skills needed, including customer care procedures 2.2 Explain the importance of handling money correctly in an enterprise activity
3 Be able to evaluate the success of the enterprise activity	3.1 Use financial records to explain the reasons for the success or failure of the enterprise activity
4 Know how to review their personal involvement in an enterprise activity	4.1 Describe their role in the enterprise activity and any skills they have gained

## Unit content

---

### 1 Be able to provide a strategy to ensure success of an enterprise activity

*Features of an effective strategy for success:* importance of planning for success eg conducting market research, finding out customer needs, considering competitors and competitor products or services, planning practical implementation of the activity (including appropriate facilities, resources, quality assurance and skills), planning for financial and cash flow aspects, evaluation of own personal and practical skills in running the enterprise activity, identifying gaps in required skills

### 2 Be able to complete an enterprise activity using appropriate skills and procedures

*Selling the product or service using appropriate skills:* suitable product or service prepared; necessary components for production or implementation obtained; promotion materials and product information produced and displayed; location prepared and enterprise activity set up; prices determined and displayed; sales skills demonstrated

*Customer care:* communicating appropriately with customers, listening to customers, answering customer questions accurately and appropriately, being friendly and helpful in manner, resolving customer problems eg defective goods, unsatisfactory level of service, incorrect price charged

*Importance of handling money correctly:* knowing correct procedures to follow in order to keep within the law, keep money safe and boost chances of making a profit, accuracy in calculations and financial records in order to reflect true financial situation

### 3 Be able to evaluate the success of the enterprise activity

*Using financial records to explain the success or failure of the enterprise:* evaluation of enterprise activity from financial records to show set-up and running costs overestimated/underestimated/accurately estimated, number of items produced or services offered exceeded/met/fell short of customer demand, profit made/not made on enterprise activity

### 4 Know how to review their personal involvement in an enterprise activity

*Role in the enterprise activity and skills gained:* roles eg salesperson, planner, team motivator, finance person, administrator, overseeing production; skills eg planning and organisation skills, research skills, promotion and sales skills, record keeping skills, motivational skills, problem-solving skills

## Essential guidance for tutors

---

### Delivery

This unit has been designed to make the key topics practically-based wherever possible. Learners should be encouraged to gain an understanding of running an enterprise activity in a highly applied way. Group working and group discussion would be appropriate, even where the learner's own assessment evidence needs to be recorded separately.

An enterprise activity does not have to be a large-scale activity. It can either be producing a product for example greeting cards, baking biscuits, making sweets, making jewellery or providing a service for example selling ice cream or car washing. Learners should be given as much practical experience as possible.

This unit has been designed so that it can be delivered with *Unit 28: Planning an Enterprise Activity* and *Unit 30: Producing a Product*.

Learners should be able to think through a strategy to ensure that their enterprise activity is successful. Learners might find it helpful to use group discussions initially to explore how they could come up with a plan to ensure their enterprise activity is successful. 'Successful' in this context means that the learner understands how to carry out their activity and reach their planned sales targets. Learners could also conduct individual research on appropriate websites or have question and answer sessions with visiting business people.

The learner's enterprise activity could be delivered as part of an 'enterprise activity day' using the format of a trade fair with a variety of stands. Alternatively, the enterprise activity could also take the form of a one-off small group activity or an individual enterprise activity.

At this level, learners could be given a degree of independence in deciding how they could run their enterprise activity. A learner in the workplace should be able to identify and use some work-related skills in running their enterprise activity.

Group discussions could be used to help learners come up with a checklist of tasks needed to carry out the activity on the day(s) chosen. This could also be an individual piece of written work or a PowerPoint presentation.

To help learners think about the key financial information they need to record in order to evaluate the overall successes and/or failures of the enterprise activity, entrepreneurs or business people could be invited to speak to learners. Visiting speakers could talk about which financial information to record, and provide examples of how financial information can be used to show the successes and failures of an enterprise activity.

If appropriate, visiting experts could also be invited to participate in a question and answer session with learners during which they share information about their own involvement in business and enterprise, and what skills and lessons they have learned from participating in enterprise initiatives. Alternatively, learners could conduct their own individual research such as looking at case studies and interviews with entrepreneurs regarding how to evaluate the financial success of an enterprise activity, as well as what personal skills might be gained from being involved in such an activity. The results of individual learner research could be shared with other learners in a group discussion or displayed in poster format in the classroom or learning area.

## **Assessment**

Assessment of this unit centres on the completion on an enterprise activity.

For 1.1, the learner must produce a strategy for achieving success in a chosen enterprise activity. This could be provided for example in a written report, a brief presentation, as video-based evidence or completion of a log or record sheet.

To achieve 2.1, the learner must provide witnessed evidence that the enterprise activity has taken place. The product or service should have been adequately prepared, the price and benefits of the product or service made clear, and appropriate sales and implementation skills must have been demonstrated by the learner. In addition, the learner must be able to demonstrate appropriate customer service skills in providing the enterprise service or product. The prepared product or service may comprise something the learner has produced themselves (for example jewellery), or something produced by someone else (for example ice cream purchased by the learner and sold on a stall at a trade fair). Photographic or video evidence could be used as well as a tutor witness statement.

2.2 requires the learner to explain at least two reasons why it is important to handle money correctly in an enterprise activity.

For 3.1, simple financial records need to be provided, showing costs and revenue for the enterprise activity. These should be accompanied by a brief explanation (verbal or written) about the link between the success or failure of the enterprise activity and its financial performance.

To achieve 4.1, there must be evidence of the learner's own evaluation of their involvement in the activity and comments on the skills that have been gained through the activity. This could be provided for example in written form, as part of a brief presentation witnessed by a tutor or completion of a self-assessment activity.

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

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

Entry Level	Level 1	Level 2
Unit 23: Planning an Enterprise Activity	Unit 31: Planning an Enterprise Activity	Unit 28: Planning an Enterprise Activity
Unit 24: Running an Enterprise Activity	Unit 32: Running an Enterprise Activity	Unit 30: Producing a Product
Unit 25: Producing a Product	Unit 33: Producing a Product	

## Essential resources

No essential resources are required for this unit.

## Websites

[www.businesslink.gov.uk](http://www.businesslink.gov.uk)

[www.enterprise-education.org.uk](http://www.enterprise-education.org.uk)

[www.enterpriseinschools.org.uk/enterpriseinschools/index.php](http://www.enterpriseinschools.org.uk/enterpriseinschools/index.php)

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

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

[www.stridingout.co.uk](http://www.stridingout.co.uk)

[www.teachernet.gov.uk/teachingandlearning/14to19/ks4/enterpriseeducation](http://www.teachernet.gov.uk/teachingandlearning/14to19/ks4/enterpriseeducation)



## Unit 30: Producing a Product

QCF Level: Level 2

Credit value: 1

Guided learning hours: 10

---

### Unit abstract

Having practical experience in producing a product or item will equip learners with a variety of skills useful for employability. This unit offers learners the opportunity to identify these skills and understand how they will be acquired. Learners will learn how to choose and make an appropriate product or item and plan how to make the product or item safely and to a desired standard of quality. They will also evaluate how the product or item was made, putting forward suggestions for changes to their plan for future manufacture.

### Learning outcomes and assessment criteria

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

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1 Understand how to plan the manufacture of a product or item	1.1 Prepare a plan that explains how to make a product or item, including the choice of materials and equipment, safety considerations and expected quality of product
2 Understand the new skills required to make the product or item	2.1 Explain the new skills needed to make the product or item 2.2 Explain how and where the new skills will be learned
3 Be able to produce the product or item safely	3.1 Demonstrate how the planned levels of safety were met in producing the product or item
4 Be able to evaluate the product or item produced	4.1 Describe how the plan for making the product or item affected the level of quality 4.2 Suggest possible future improvements that could be made in producing the product or item

## Unit content

---

### 1 Understand how to plan the manufacture of a product or item

*Planning to make the product or item:* logical, cost-effective and realistic plan for the product or item to be made

*Choice of resources and materials for product or item:* cost, quality, availability all affect choice of equipment eg knowledge of using equipment

*Safety factors:* using equipment and safety clothing; effectiveness of equipment; training needed before using certain types of equipment eg tools, measuring instruments, appliances, containers

*Expected quality of product:* eg appearance, durability, effectiveness, taste, size, shelf-life

### 2 Understand the new skills required to make the product or item

*New skills needed to make the product or item:* personal skills eg creativity, determination, confidence; practical skills eg using new equipment, using new techniques or processes, problem-solving skills

*How and where new skills will be learned:* undertake training, consult training manuals, user guides, internet or other sources of information, seek advice from others who have experience in relevant areas, observe others producing a product or using a piece of equipment, obtain help from experienced person in making an initial sample of the product or item

### 3 Be able to produce the product or item safely

*Planned levels of safety in producing the product or item:* use correct materials, methods and equipment as required; use any equipment effectively and safely; use appropriate safety clothing and protection if required eg safety glasses, appropriate footwear, gloves; first aid supplies available; produce safe item or product

### 4 Be able to evaluate the product or item produced

*Impact of the original product plan on quality of the product:* quality of planned choice of equipment, resources and materials; effectiveness of planned timeline for production; appropriateness of skills originally identified or not identified

*Future improvements:* suggestions for changes to plan in the light of experience eg change timescales, use different equipment or materials, obtain additional help or resources, investigate costs of materials more thoroughly

## Essential guidance for tutors

---

### Delivery

This unit has been designed to make the key topics practically based wherever possible. Learners should be encouraged to gain an understanding of producing a product or item in a highly applied way. Group working and group discussion would be appropriate, even where the learner's own assessment evidence needs to be recorded separately.

Learners' activities will require them to sequence and organise their assessment evidence. They should be able to use appropriate reading, writing and other communication skills to do so. This unit is about developing skills needed to make a product or item under limited supervision. At this level, the appropriate degree of learner independence should be encouraged but learners are likely to require regular assessor support and guidance. Tutors should support learners in reviewing progress made, identifying knowledge and skills that have been developed as well as areas of knowledge, understanding and skills that need improvement. Learners may also want to seek advice from people they know who are involved in manufacturing products or items. Alternatively, entrepreneurs could be invited to speak to the group about their experiences in producing a product or item. Case studies, TV documentaries or the internet may also prove useful sources of information for learners.

Activities can be carried out individually, or a group of learners could work together to make an item or product. The item or product itself can be very simple in design-it is the learners' learning experiences which are of most importance.

The learning outcomes and assessment criteria refer to 'products or items'. Learners could produce small items such as handmade jewellery, candles, confectionery or gift boxes as well as larger-scale products which might require use of workshop facilities.

Delivery of this unit could be carried out in conjunction with *Unit 28: Planning an Enterprise Activity* and *Unit 29: Running an Enterprise Activity*'.

### Assessment

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

A range of assessment activities can be used. Methods such as photographs, video and audio recordings could add to the range of evidence suggested.

For 1.1, a plan must be undertaken and presented for producing a product or item, explaining the choice of materials and equipment, any relevant safety considerations and the expected quality of the product or item. The learner must describe the benefits of all the chosen materials and equipment, as well as any potential difficulties or disadvantages. The learner does not need to show that they have accounted for all possible safety considerations, but all major safety considerations will need to be referenced in their plan so that it is obvious the learner intends to produce the product or item with safety in mind. The description of the intended quality of the product or item may be brief and straightforward, but must be clear. Tutors may support learners in finding suggestions of effective ways to plan the

production of a product or item, but the plan must be chosen and compiled by the learner independently. A variety of appropriate means of evidence may be used for 1.1 such as a planning log, a written proposal, PowerPoint presentation, video clip or leaflet.

2.1 requires the learner to explain at least one new skill that they will need to acquire in order to produce the product or item. It may be a personal and practical skill.

For 2.2, the learner should explain how and where the new skill referred to in 2.1 will be acquired.

To achieve 3.1, observation by the tutor of the learner making the product or item safely, or making an aspect of the product or item safely, will need to be recorded. The learner also needs to explain two different safety measures that they took in producing the product or item.

For 4.1, the learner must describe how the plan for making the product or item affected the level of quality of the final product or item. The learner does not need to describe the impact of every aspect of the original plan, but needs to highlight the parts of the original plan that had a significant impact on the quality of the final product or item. Evidence for 4.1 could take the form of a recorded discussion in which the learner comments on the impact of the product plan on the quality of the finished item or product. Alternatively, a question and answer session with a witness statement may be used. If a written plan was used by the learner for 1.1, the learner could cross-reference the quality of the product or item against the relevant aspects described in the planning template.

For 4.2, the learner must make at least one suggestion for a possible future improvement in producing the product or item. The suggestion should be appropriately recorded, for example in written form by the learner or by the tutor as a result of the learner's participation in a discussion with the tutor or in a small group.

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

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

Entry Level	Level 1	Level 2
Unit 23: Planning an Enterprise Activity	Unit 31: Planning an Enterprise Activity	Unit 28: Planning an Enterprise Activity
Unit 24: Running an Enterprise Activity	Unit 32: Running an Enterprise Activity	Unit 29: Running an Enterprise Activity
Unit 25: Producing a Product	Unit 33: Producing a Product	

## **Essential resources**

Learners will need to access to an area suitable for the practical activities undertaken, for example, a workshop or practical workroom. A variety of materials including wood, metal, soft- cottons and fabrics will enable learners to become familiar with the properties of different materials.

Depending on the product or item the learner will be producing, appropriate safety gear and equipment will be required and the location of first aid supplies and support need to be known.

Where photographs and recordings, audio and video, are to be used as evidence, appropriate equipment will be needed.

## **Websites**

[www.businesslink.gov.uk](http://www.businesslink.gov.uk)

[www.enterprise-education.org.uk](http://www.enterprise-education.org.uk)

[www.enterpriseinschools.org.uk/enterpriseinschools/index.php](http://www.enterpriseinschools.org.uk/enterpriseinschools/index.php)

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

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

[www.stridingout.co.uk](http://www.stridingout.co.uk)

[www.teachernet.gov.uk/teachingandlearning/14to19/ks4/enterpriseeducation](http://www.teachernet.gov.uk/teachingandlearning/14to19/ks4/enterpriseeducation)



# Annexe A

## QCA codes

The QCA Qualifications and Credit Framework (QCF) code is known as a Qualification Accreditation Number (QAN). This is the code that features in the DCSF Funding Schedules, Section 96 and Section 97, and is to be used for all qualification funding purposes. Each unit within a qualification will also have a QCA QCF unit code.

The QCA qualification and unit codes will appear on the learner's final certification documentation.

The QAN for the qualification in this publication is:

500/4076/5 – Edexcel Level 2 BTEC Award in WorkSkills (QCF)

500/4071/6 – Edexcel Level 2 BTEC Certificate in WorkSkills (QCF)

500/4077/7 – Edexcel Level 2 BTEC Diploma in WorkSkills (QCF)

August 2008

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

BTEC is a registered trademark of Edexcel Limited

Edexcel Limited. Registered in England and Wales No. 4496750  
Registered Office: One90 High Holborn, London WC1V 7BH. VAT Reg No 780 0898 07

Ofqual  
.....



Llywodraeth Cynulliad Cymru  
Welsh Assembly Government



Rewarding Learning