



National Occupational Standards for
Learning and Development
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Introduction

1. Introduction

National Occupational Standards (NOS) for Learning and Development were first approved in 2001. Since their introduction, they have been extensively used within the learning and development community by a range of practitioners engaged in industrial and work based training, qualification delivery and consultancy. Many individual NOS have been adopted by other sectors, such as justice, social care and land-based industries, to cover their learning and development roles. Individual NOS from the suite have been very widely used as part of the assessor and verifier qualifications which are a requirement for N/SVQ delivery.

During 2009, Lifelong Learning UK carried out an extensive programme of research and consultation with the learning and development community and with other Sector Skills Councils and awarding organisations. As a result we have now revised and updated these NOS to make them more streamlined and reflective of current good practice.

2. Who are the National Occupational Standards for?

The NOS are designed for learning and development practitioners who are involved in developing and assessing the skills, knowledge and competence of learners primarily in the workplace or in work-related programmes of learning. They apply therefore to the following types of job roles in the lifelong learning sector for which learning and development is the main purpose:

- in-house trainers and training managers
- external trainers, managers and consultants
- assessors
- verifiers.

In addition, individual NOS will be valuable to staff in all sectors who have a learning and development function as part of their job role; for example:

- workplace managers and supervisors
- experienced staff with responsibility for developing colleagues with less experience, skills and knowledge
- assessors
- verifiers.

3. What do the National Occupational Standards for Learning and Development cover?

There are 13 NOS for Learning and Development, which are based on a familiar structure known as the 'training cycle' or 'learning cycle'. This is presented in the following phases or 'key areas'.

- A. Research learning and development needs.
- B. Plan and develop learning and development opportunities.
- C. Facilitate learner achievement.
- D. Maintain and improve quality standards.

The diagram shows how the NOS for Learning and Development fit into this structure. It is important to note that the NOS for Learning and Development only cover what is exclusive to learning and development. Other approved NOS – for example covering management and leadership or personnel – may be necessary to provide full coverage for some job roles.

4. Structure and coverage of the National Occupational Standards for Learning and Development

With a focus on training and development, the structure of the Learning and Development suite of NOS follows the typical training cycle.

Key area A: Research learning and development needs

- 1 Identify collective learning and development needs
- 2 Identify individuals' learning and development needs

Key area D: Maintain and improve quality standards

- 10 Reflect on, develop and maintain own skills and practice in learning and development
- 11 Internally monitor and maintain the quality of assessment
- 12 Externally monitor and maintain the quality of assessment
- 13 Evaluate and improve learning and development provision



Key area B: Plan and develop learning and development opportunities

- 3 Plan and prepare learning and development programmes
- 4 Plan and prepare specific learning and development opportunities
- 5 Develop and prepare resources for learning and development

Key area C: Facilitate learner achievement

- 6 Manage learning and development in groups
- 7 Facilitate individual learning and development
- 8 Engage and support learners in the learning and development process
- 9 Assess learner achievement

5. What's new in the National Occupational Standards for Learning and Development?

Several features of the NOS have changed.

1. The NOS have been presented in a new format.

The NOS are now much shorter with a clear emphasis only on essential areas of performance, knowledge and understanding. The new format should make it much easier for the NOS to be used for a range of purposes by learning and development organisations.

2. There are now fewer NOS than before.

The 2001 NOS for Learning and Development contained 32 separate standards. The new suite contains only 13. This has been achieved by removing some of the overlap and duplication between the standards and focusing on what is essential to learning and development.

3. Previous 'A' NOS have been merged into one standard covering assessment.

Background research suggested that the existing NOS for assessment could be brought together into one new standard that covers assessment of all kinds, not just workplace competence (although this is still included as a possible context). It was felt that the distinction between A1 and A2 was unhelpful and that a general assessment standard would be more appropriate to the diversity of qualifications that are emerging in the Qualifications and Credit Framework (QCF), the Scottish Credit and Qualifications Framework (SCQF) and the Qualifications and Credit Framework for Wales (CQFW). This standard addresses the fundamental principles of assessment and the essential outcomes. It still allows for the possibility that qualifications – for example, specifically for assessing workplace competence – can be developed based on this standard.

4. There is a degree of integration with the new NOS for Learning Delivery.

Lifelong Learning UK has recently developed a suite of standards for learning delivery. These address the needs of practitioners working in the further education sectors in England, Wales, Northern Ireland and Scotland.¹ Many of the new NOS for Learning and Development closely map to learning delivery and the overall structure is based on the same training/learning cycle. Both of these features were felt to be helpful in maintaining consistency between further education and work based provision.

¹ Further information on the NOS for Learning Delivery can be found at <http://www.lluk.org/national-occupational-standards.htm>

6. What other NOS could be useful to learning and development practitioners?

This suite of NOS focuses on what is unique and specific to learning and development. However there are a number of other NOS suites that contain standards that could be useful to Sector Skills Councils and other organisations that may wish to compile sets of NOS – perhaps through role maps or competence frameworks – within which learning and development features. These include the following NOS, located on the Occupational Standards Directory (www.ukstandards.co.uk).

1. Management and Leadership (<http://tiny.cc/NOS-ML>)
2. Learner Involvement (<http://tiny.cc/NOS-LI>)
3. Advice and Guidance (<http://tiny.cc/NOS-AG>)
4. Coaching and Mentoring in the Work Environment (<http://tiny.cc/NOS-CMWE>)
5. Personnel (<http://tiny.cc/NOS-PSL>).

7. What do the new NOS mean for qualifications?

Lifelong Learning UK is working closely with the sector and awarding organisations to develop units and qualification structures that will provide new qualifications for the QCF, SCQF and CQFW.

8. The National Occupational Standards for Learning and Development

There are 13 standards which are organised into four key areas (KAs).

Standard 1

Identify collective learning and development needs

What this standard is about

This standard is about carrying out a training and learning needs analysis for teams, groups, departments or organisations.

Terminology

Within this standard the following explanations and examples apply.

Collective learning needs	The learning needs that a group of learners have in common. Groups in this context could be, for example, whole organisations or teams within organisations
Focus of learning	What it is that needs to be learnt, for example, customer service, managing people or how to use new equipment
Stakeholders	All those who have an interest in the training/learning needs analysis, for example, managers, Human Resource staff, learners themselves

The standard

Performance criteria Learning and development practitioners:	Knowledge and understanding Learning and development practitioners know and understand:
<p>1.1 Gain the support and commitment of key stakeholders</p> <p>1.2 Identify the aims of the analysis, the information required, and efficient means of data collection</p> <p>1.3 Collect sufficient information relevant to the learners and their context to identify learning and development needs</p> <p>1.4 Prioritise learning and development needs, indicating the focus and volume of learning required</p>	<p>KU1 The principles that underpin learning needs analysis for teams, groups or organisations</p> <p>KU2 The contribution that learning and development can make to helping teams, groups and organisations achieve their goals and objectives</p> <p>KU3 The types of stakeholders involved in an analysis of collective learning needs and why their support and commitment are important</p> <p>KU4 The types of qualitative and quantitative information required to undertake an analysis of collective learning needs</p> <p>KU5 The importance of collecting and analysing relevant information including:</p>

<p>Performance criteria</p> <p>Learning and development practitioners:</p>	<p>Knowledge and understanding</p> <p>Learning and development practitioners know and understand:</p>
<p>1.5 Communicate findings and recommendations to decision makers in ways that will aid their understanding</p> <p>1.6 Negotiate any adjustments to findings and recommendations with decision makers</p> <p>1.7 Maintain confidentiality agreement</p>	<ul style="list-style-type: none"> • learners’ collective goals and objectives • the impact of change on roles and ways of doing things • the requirements for skills, knowledge, attitudes and competence • learners’ existing capabilities and potential • attitudes to learning <p>KU6 Sources of information, and efficient data collection methods, including the use of technology</p> <p>KU7 How to analyse qualitative and quantitative data to identify collective learning needs</p> <p>KU8 Issues related to equality and diversity that may affect data collection and collective learning</p> <p>KU9 Issues related to technology and changing work practices that impact on collective learning needs</p> <p>KU10 The issues to consider when prioritising collective learning needs</p> <p>KU11 How to identify the focus and volume of learning required and the timescales required for implementation</p> <p>KU12 Who may be involved in making decisions about findings and recommendations</p> <p>KU13 Effective methods of communicating findings and recommendations to decision makers</p> <p>KU14 Why a practitioner should use their professional experience and expertise to negotiate with decision makers on findings and recommendations</p> <p>KU15 Why confidentiality is important when identifying collective learning needs and how to maintain the confidentiality of data, findings and recommendations</p>

Standard 2:

Identify individuals' learning and development needs

What this standard is about

This standard is about carrying out a training and learning needs analysis for individual learners.

Terminology

Assess and manage risk	This could be a formal and written risk assessment but could be informal and dynamic – monitoring and controlling risk on an ongoing basis
Learner achievements	These could be formal e.g. examination grades or informal e.g. periods of work experience and skills and knowledge gained through these
Requirements	These could be the requirements of the practitioner's own organisation or those of an external organisation, such as a funding body or an awarding organisation
Risk	This includes health and safety risks but may also include, for example, the risk of initial assessment methods not being accurate or evidence of past achievement not being authentic
Safe	This includes physical safety as well as emotional well-being

The standard

Performance criteria Learning and development practitioners:	Knowledge and understanding Learning and development practitioners know and understand:
<p>2.1 Identify the learner's objectives, motivation to learn and any requirements relevant to the learning needs analysis</p> <p>2.2 Review the learner's achievements, evaluating these against relevant objectives and requirements</p> <p>2.3 Use safe, reliable and valid methods to assess the learner's capabilities and potential</p> <p>2.4 Analyse the learner's capabilities and potential in the context of their objectives and other requirements</p>	<p>KU1 The principles that underpin learning needs analysis for individual learners</p> <p>KU2 Why it is important to identify a learner's objectives and motivation to learn when analysing their learning needs</p> <p>KU3 Other requirements from organisations or external agencies that may affect a learning needs analysis</p> <p>KU4 Methods of reviewing a learner's formal and informal achievements</p>

S2 Identify individuals' learning and development needs

Performance criteria Learning and development practitioners:	Knowledge and understanding Learning and development practitioners know and understand:
<p>2.5 Agree and prioritise the learner's learning needs</p> <p>2.6 Support learners in identifying their own preferred ways of learning</p> <p>2.7 Give the learner constructive and realistic feedback on their expectations and possible learning and development opportunities</p> <p>2.8 Maintain agreements about confidentiality</p>	<p>KU5 Methods of giving recognition for prior learning and achievement</p> <p>KU6 Methods, which include the appropriate use of technology, to carry out an initial assessment of capability and potential</p> <p>KU7 How to select initial assessment methods which are safe, reliable and valid for the learner and their objectives</p> <p>KU8 How to assess and manage risk when carrying out initial assessments</p> <p>KU9 Issues related to equality and diversity that may affect an individual learning needs analysis and how to address these</p> <p>KU10 Who to make agreements with and the issues to consider when prioritising an individual's learning needs</p> <p>KU11 The communication and personal skills that practitioners need when identifying an individual's learning needs</p> <p>KU12 Preferred ways of learning and how these may affect choices about possible learning and development opportunities</p> <p>KU13 Different methods of supporting learners to identify their preferred ways of learning, and how to use this information to support their learning</p> <p>KU14 Different methods of providing feedback to a learner on the outcomes of the learning needs analysis, and the advantages and disadvantages of these methods</p> <p>KU15 Why confidentiality is important when identifying learning needs and what information to safeguard</p>

Standard 3:**Plan and prepare learning and development programmes****■ What this standard is about**

This standard is about planning and preparing learning and development programmes to meet identified needs and requirements. It applies to planning for both groups and individuals. 'Programme' refers to any planned sequence of learning opportunities which lead to agreed outcomes. Examples might include a course, a programme of learning in the workplace, or an individual coaching programme.

■ Terminology

Within this standard the following explanations and examples apply.

Delivery methods	Any method that supports learning and development, for example, presentations, instructions, demonstrations, opportunities to apply knowledge and practise skills, experiential learning, group and individual projects and research
Learning and development opportunities	Any event that assists the acquisition of skills and knowledge. This includes formal sessions as well as experiences such as visits, time spent in the workplace, personal research etc.
Outcomes	These could be outcomes for the group as a whole – for example enabling team effectiveness – and/or outcomes for the individuals who make up the group – for example individual skill acquisition
Programme	A planned sequence of learning and development opportunities over a period of time which lead to agreed learning outcomes, for example a 'course'
Requirements	These could be the requirements of the practitioner's own organisation or those of an external organisation, such as a funding body or an awarding organisation
Resources	This covers any physical or human resource that supports the learning and development process and could include technical equipment, IT-based learning, handouts, workbooks, people – for example outside speakers – and visits to places of interest

Risk assessments	This could be a formal and written risk assessment but could be informal and dynamic – monitoring and controlling risk on an ongoing basis. Risk includes health and safety but may also cover finance, availability of resources etc.
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■ The standard

Performance criteria Learning and development practitioners:	Knowledge and understanding Learning and development practitioners know and understand:
<p>3.1 Identify learning outcomes that meet agreed learning and development needs</p> <p>3.2 Develop a coherent plan of learning and development opportunities appropriate to the learning outcomes and internal/external requirements</p> <p>3.3 Identify realistic delivery and assessment methods appropriate to learning and development opportunities</p> <p>3.4 Identify the resources needed to deliver the plan and ensure these are within allocated budgets</p> <p>3.5 Ensure arrangements for the delivery of the plan are in place</p> <p>3.6 Identify how the learning will be monitored and evaluated</p> <p>3.7 Communicate the plan to learners and other people involved in the provision of learning and development</p> <p>3.8 Ensure the plan conforms to relevant policies, procedures and legislation</p>	<p>KU1 How information acquired from analysing learning and development needs contributes to planning, and the factors that need to be taken into account</p> <p>KU2 How to identify a range of options for meeting learning outcomes and the strengths and weaknesses of different approaches, including the use of technology</p> <p>KU3 How to develop a plan of learning and development opportunities that meets different learning needs, including those relating to equality and diversity</p> <p>KU4 The types of internal and external requirements that may affect planning, including, where relevant, bilingualism</p> <p>KU5 Factors that need to be managed when arranging and co-ordinating learning and development opportunities</p> <p>KU6 How to carry out risk assessments, and the factors that need to be considered in the learning context</p> <p>KU7 The importance of flexibility and contingency planning when developing programmes</p> <p>KU8 The learning cycle and how this should inform the planning process</p>

Performance criteria Learning and development practitioners:	Knowledge and understanding Learning and development practitioners know and understand:
	<p>KU9 Why it is important for learner needs to be at the centre of programme plans</p> <p>KU10 How to involve learners in the development of programme plans</p> <p>KU11 The range of resources – including the use of technology – that may be needed to facilitate, monitor and evaluate learning and development and how to identify them</p> <p>KU12 How planning and resource needs can be affected by the learners’ identified abilities and needs, including the use of language</p> <p>KU13 The organisational, legal and professional requirements that should be followed when planning learning and development programmes</p> <p>KU14 The arrangements required for the delivery of the plan, including the systems, structures and relationships needed for effective implementation</p> <p>KU15 The factors that need to be considered when monitoring the implementation of the plan and evaluating the effectiveness of learning</p> <p>KU16 How continuous evaluation can help to shape the development and implementation of learning plans and improve learning</p> <p>KU17 The colleagues with whom plans should be shared</p> <p>KU18 How to encourage the commitment and understanding which learners and colleagues need to be effective in the implementation of programmes</p>

Standard 4:

Plan and prepare specific learning and development opportunities

■ What this standard is about

This standard is about planning and preparing specific/individual learning and development opportunities, for example formal training sessions or informal experiences such as periods in the workplace. It applies to planning for individuals as well as planning for groups.

■ Terminology

Within this standard the following explanations and examples apply.

Delivery methods	Any method that supports learning and development, for example, presentations, instructions, demonstrations, opportunities to apply knowledge and practise skills, experiential learning, group and individual projects and research
Learning and development opportunities	Any event that assists the acquisition of skills and knowledge. This includes formal sessions as well as experiences such as visits, time spent in the workplace, personal research etc.
Outcomes	These could be outcomes for the group as a whole – for example enabling team effectiveness – and/or outcomes for the individuals who make up the group – for example individual skill acquisition
Resources	This covers any physical or human resource that supports the learning and development process and could include technical equipment, IT-based learning, handouts, workbooks, people – for example outside speakers – and visits to places of interest
Risk assessments	This could be a formal and written risk assessment but could be informal and dynamic – monitoring and controlling risk on an ongoing basis. Risk includes health and safety but may also cover finance, availability of resources etc.

■ The standard

Performance criteria Learning and development practitioners:	Knowledge and understanding Learning and development practitioners know and understand:
<p>4.1 Identify the purpose and outcomes of specific learning and development opportunities in relation to agreed goals</p> <p>4.2 Communicate aims and objectives to learners</p> <p>4.3 Identify how specific learning and development opportunities will be delivered and/or facilitated and managed</p> <p>4.4 Identify the resources needed to deliver and/or facilitate specific learning and development opportunities</p> <p>4.5 Identify how learning and development opportunities will be monitored and evaluated</p> <p>4.6 Ensure preparations and arrangements for delivery and/or facilitation, management and evaluation are carried out in sufficient time</p> <p>4.7 Ensure plans are appropriate to identified learning needs and meet organisational and legal requirements</p>	<p>KU1 The importance of having clear outcomes for specific learning and development opportunities</p> <p>KU2 Different methods of communicating aims and objectives to learners</p> <p>KU3 Options for delivering and/or facilitating different types of learning and development opportunities</p> <p>KU4 Factors to consider in selecting suitable delivery and facilitation methods</p> <p>KU5 The range of planning considerations relevant to ensuring that equality, diversity and, where relevant, bilingualism needs are met</p> <p>KU6 Factors that need to be considered in the management of different learning and development opportunities and how to deal with these factors</p> <p>KU7 The resources, including technology, available to support delivery and / or facilitation and management of learning and development opportunities</p> <p>KU8 The advantages and disadvantages of different types of resources in meeting learner needs</p> <p>KU9 The types of preparations that need to be undertaken for different learning opportunities and why each of these is important</p> <p>KU10 How to carry out a risk assessment in relation to planning for specific learning</p>

<p>Performance criteria Learning and development practitioners:</p>	<p>Knowledge and understanding Learning and development practitioners know and understand:</p>
	<p>and development opportunities, and the contingencies which should be put in place in response to risk assessments</p> <p>KU11 The operational requirements that should be considered in planning specific learning and development opportunities, including organisational, health and safety, budgetary and legislative guidelines</p>

Standard 5:

Develop and prepare resources for learning and development

What this standard is about

This standard is about preparing resources to support learning and development. It covers developing resources 'from scratch' as well as adapting and preparing existing resources to meet the needs of learners. It also covers the preparation of resources including the learning environment, learning materials and equipment used to support learning.

Terminology

Within this standard the following explanations and examples apply.

Resources	This covers any physical or human resource that supports the learning and development process and could include technical equipment, Information Technology-based learning, handouts, workbooks and visits to places of interest
Target group	Those learners who will be using the resources

The standard

Performance criteria Learning and development practitioners:	Knowledge and understanding Learning and development practitioners know and understand:
<p>5.1 Agree the range and purpose of resources required</p> <p>5.2 Identify the resource needs of the individuals or groups that the resources are being prepared for</p> <p>5.3 Identify and develop resources which are appropriate to the target group and the purpose for which they are required</p> <p>5.4 Ensure anyone else who is using the resources receives the necessary guidance</p>	<p>KU1 The different types of resources that can be used to support learning across the full range of the training cycle</p> <p>KU2 The range of resources available to support different types of needs</p> <p>KU3 The importance of distinguishing between different user needs and the factors which are important in selecting and developing resources to meet these needs</p> <p>KU4 The factors that need to be considered in the effective preparation and development of learning resources, including those for the learning environment, learning materials and equipment</p>

<p>Performance criteria</p> <p>Learning and development practitioners:</p>	<p>Knowledge and understanding</p> <p>Learning and development practitioners know and understand:</p>
<p>5.5 Ensure adaptations to existing resources are consistent with learning needs and professional practice</p> <p>5.6 Ensure resources are consistent with legislative, safety, equality and diversity and professional guidelines</p> <p>5.7 Make sure that resources are checked and tested to ensure they meet required standards and learner needs</p>	<p>KU5 How to identify costs and timescales for resource development</p> <p>KU6 The factors which are important in selecting and developing resources to meet the needs of different learners, taking account of the need for equality and diversity</p> <p>KU7 How to ensure that the language, style and format of the materials are appropriate to the needs of the learners.</p> <p>KU8 How to develop simulated exercises that replicate real working challenges</p> <p>KU9 How to set up and use equipment to support learning and development</p> <p>KU10 The contribution and challenges that technology can make to the development and adaptation of different types of resources and the challenges posed by these</p> <p>KU11 How to develop guidance for the use of resources and how to encourage consistent application</p> <p>KU12 The types of adaptations that could be made to resources to make them more appropriate to learning needs and user requirements</p> <p>KU13 The legislative, safety and professional guidelines relating to the development and adaptation of resources, including those relating to intellectual property, copyright and patents</p> <p>KU14 The importance of checking and testing resources to make sure they are of the required standard and how to do this effectively</p> <p>KU15 How to make adaptations to the learning environment to support the learning process</p> <p>KU16 The preparation, support and qualifications that staff require to contribute effectively to learning and development activities within own area of responsibility</p>

Standard 6:**Manage learning and development in groups****What this standard is about**

This standard is about using a range of methods to enable group members to learn and develop in a safe and supportive learning environment.

Terminology

Within this standard the following explanations and examples apply.

Delivery methods	Any method that supports learning and development, for example presentations, instructions, demonstrations, opportunities to apply knowledge and practise skills, experiential learning, group and individual projects and research
Environment	This includes the physical environment in which learning and development takes place but also covers group dynamics and behaviour
Health and safety	This includes physical health and safety as well as emotional well-being
Outcomes	These could be outcomes for the group as a whole – for example enabling team effectiveness – and/or outcomes for the individuals who make up the group – for example individual skill acquisition
Requirements	These could be the requirements of the practitioner's own organisation or those of an external organisation, such as funding body or awarding organisation
Resources	This covers any physical or human resource that supports the learning and development process and could include technical equipment, Information Technology-based learning, handouts, workbooks, people – for example outside speakers – and visits to places of interest
Risk	This refers to any risk to the effective facilitation of the group. Risks may be to individual learners, to the group as a whole or to those facilitating. This includes health and safety risks but may also include, for example, the risk of delivery methods not being appropriate
Other people	This refers to others who may be involved in, or affected by, the learning activities, for example, staff members, volunteers, assistants or people in the same area

■ The standard

Performance criteria Learning and development practitioners:	Knowledge and understanding Learning and development practitioners know and understand:
<p>6.1 Manage a group environment in which individuals feel valued, supported, confident and able to learn</p> <p>6.2 Communicate with learners in a way that meets individual and group needs</p> <p>6.3 Make learners aware of the outcomes they are expected to achieve and how the planned activities will support these</p> <p>6.4 Use a range of delivery methods, activities and resources to meet the needs of all group members, as appropriate to planned outcomes</p> <p>6.5 Balance and adjust delivery to meet individual needs while achieving planned group outcomes and agreements</p> <p>6.6 Monitor learner response and use appropriate strategies to motivate learners individually and collectively</p> <p>6.7 Encourage effective communication within the group</p> <p>6.8 Maintain the health and safety of learners, self and other people</p>	<p>KU1 The learners needs, requirements and planned outcomes relevant to their own areas of work</p> <p>KU2 The types of learning resources available, including those that are technology enhanced, that can support learning and development in groups</p> <p>KU3 The factors to consider when selecting and using learning and development resources to facilitate learning and development in groups</p> <p>KU4 The characteristics of a group environment that foster learning and development for all those involved</p> <p>KU5 Different techniques to manage group dynamics</p> <p>KU6 Aspects of equality, diversity and, where relevant, bilingualism, that need to be addressed when facilitating learning and development in groups</p> <p>KU7 Different ways of encouraging behaviour and values that foster mutual respect and support the learning and development process</p> <p>KU8 The importance of own communication skills and different ways to communicate effectively with groups, and individuals within groups</p> <p>KU9 The range of delivery methods appropriate to learning in groups</p> <p>KU10 How to co-ordinate learning and development activities to meet individual and group needs</p>

<p>Performance criteria Learning and development practitioners:</p>	<p>Knowledge and understanding Learning and development practitioners know and understand:</p>
	<p>KU11 The types of motivational strategies that would support group and individual learning and how to select these according to identified needs</p> <p>KU12 Techniques that can be used to monitor learner response</p> <p>KU13 Different ways of adapting delivery according to learner response whilst still achieving planned outcomes and agreements</p> <p>KU14 How to assess and manage risk in own area of work whilst facilitating learning and development in groups</p>

Standard 7:

Facilitate individual learning and development

What this standard is about

This standard is about using a range of methods to enable individuals to acquire or improve skills and knowledge and practise their application in context. It also covers providing feedback to learners and encouraging them to reflect on and improve what they do. This standard could be achieved as part of a coaching and/or mentoring relationship.

Terminology

Within this standard the following explanations and examples apply.

Application	The process of applying new or improved skills and knowledge in a real or realistic context, for example a work situation
Goals	This refers to interim targets or steps towards learners meeting overall outcomes and objectives
Health and safety	This includes physical health and safety as well as emotional well-being
Learner objectives	These will usually be performance objectives – for example doing something or doing something better
Methods	Any method that supports individual learning and development, for example, instructions, demonstrations, opportunities to apply knowledge and practise skills, experiential learning, individual projects and research
Other people	This refers to others who may be involved in, or affected by, the learning activities, for example, staff members, volunteers, assistants or people in the same area.
Reflection/reflective practice	The process of thinking critically about what we do, identifying opportunities for improvement and, where appropriate, further learning needs
Resources	This covers any physical or human resource that supports the learning and development process and could include technical equipment, Information Technology-based learning, handouts, workbooks, people – for example outside speakers – and visits to places of interest
Risk	This relates to any risk to the facilitation of learning and development. This includes health and safety but could also cover, for example, the risk of setting unrealistic goals or selecting inappropriate learning methods

■ The standard

Performance criteria Learning and development practitioners:	Knowledge and understanding Learning and development practitioners know and understand:
<p>7.1 Establish and maintain a professional relationship with the learner that supports individual learning and reflection</p> <p>7.2 Explore and agree the learner's objectives, learning needs and goals</p> <p>7.3 Agree a plan of learning, application and reflection</p> <p>7.4 Use a range of methods and resources to help the learner acquire/develop the skills and knowledge they need</p> <p>7.5 Support the learner in applying their learning in context</p> <p>7.6 Provide constructive and motivational feedback to improve the learner's application of learning</p> <p>7.7 Assist the learner to reflect on their practice and experience</p> <p>7.8 Adapt learning, application and reflection to meet further needs</p> <p>7.9 Maintain the health and safety of the learner, self and other people</p>	<p>KU1 The principles, uses and value of learning and development on an individual basis</p> <p>KU2 The characteristics of a relationship that supports individual learning, application and reflection</p> <p>KU3 Aspects of equality and diversity that need to be addressed when facilitating individual learning and development</p> <p>KU4 The importance of reflective practice in individual learning and development</p> <p>KU5 Key factors to consider when setting and agreeing goals with individual learners</p> <p>KU6 The range of delivery methods appropriate to individual learning</p> <p>KU7 The range of resources, including support from others, that are available to support individual learning</p> <p>KU8 How technology can enhance resources and delivery methods for individual learning</p> <p>KU9 The range of techniques that can be used to encourage reflective practice by the learner</p> <p>KU10 How to support different types of learners in applying new or enhanced learning in context</p> <p>KU11 The types of barriers that learners encounter and how to develop strategies to overcome these</p> <p>KU12 How to adapt learning plans in response to learner progress and reflection whilst still focusing on learner needs and desired outcomes</p> <p>KU13 How to assess and manage risk in own area of work whilst facilitating learning and development for individuals</p>

Standard 8:

Engage and support learners in the learning and development process

■ What this standard is about

This standard is about supporting learners through the learning process by, for example, providing them with information and advice, helping them overcome barriers, helping them access the learning and experience they need, monitoring progress against expected standards and providing constructive feedback.

■ Terminology

Within this standard the following explanations and examples apply.

Barriers	Anything that might prevent the learner taking a full part. This could include, for example, lack of confidence or essential skills and knowledge
Expected standards	The standards the learner should achieve as part of their learning programme. These could include national occupational standards or standards set by other types of qualifications
Learning process	This may include experience, such as time in the workplace, as well as formal and informal training
Provide evidence of achievement	This could include providing witness statements to qualified assessors

■ The standard

Performance criteria Learning and development practitioners:	Knowledge and understanding Learning and development practitioners know and understand:
<p>8.1 Establish and maintain a positive relationship with the learner which encourages and motivates learning</p> <p>8.2 Provide the learner with information and advice relevant to their needs</p> <p>8.3 Enable the learner to engage with, and contribute to, their own learning</p> <p>8.4 Assist the learner to access the skills, knowledge and experience they need</p> <p>8.5 Help the learner overcome any barriers that prevent them taking a full part in the learning process</p> <p>8.6 Support the learner in taking responsibility for their own development</p> <p>8.7 Monitor the learner's performance against expected standards and provide evidence of achievement to others as required</p> <p>8.8 Provide constructive feedback to the learner</p> <p>8.9 Review learner progress and help them adapt their plans as necessary</p>	<p>KU1 The characteristics of a relationship that supports the learner's progress and provides them with motivation to learn</p> <p>KU2 The types of information and advice that learners may require and how to provide or access this</p> <p>KU3 Different strategies to enable learners to engage with learning</p> <p>KU4 Aspects of equality and diversity that need to be addressed when supporting learners</p> <p>KU5 The range of techniques through which different types of learners can contribute to their own learning</p> <p>KU6 The types of barriers to learning that different types of learners experience and how to address these</p> <p>KU7 How to help individuals with different types of learning needs access the skills, knowledge and experiences they need to progress</p> <p>KU8 The boundaries of own role and when to refer the learner to other sources of help and support</p> <p>KU9 The range of resources, including support from others and technology-based solutions, that are available to support learners</p> <p>KU10 Why it is important that learners take responsibility for their own learning and different methods of helping them to do so</p> <p>KU11 Methods that can be used to enable learners to provide honest and constructive feedback on their experiences and how to use this feedback when it has been collected</p>

<p>Performance criteria Learning and development practitioners:</p>	<p>Knowledge and understanding Learning and development practitioners know and understand:</p>
	<p>KU12 Methods that can be used to monitor the learner’s performance against required standards</p> <p>KU13 Different methods of presenting evidence of learner achievement to others</p> <p>KU14 Different methods of providing the learner with constructive feedback and how to use these methods effectively</p> <p>KU15 The importance of reviewing learner progress and appropriate times to do so</p> <p>KU16 The factors which are important in helping learners to review their progress and, where necessary, adapt their plans for learning and progression</p>

Standard 9:

Assess learner achievement

■ What this standard is about

This standard is about assessing learning and development against agreed criteria. It covers a range of different assessments including competence, knowledge and understanding and skills.

■ Terminology

Within this standard the following explanations and examples apply.

Assessment method	For example observation, questioning, checking products of work, setting assignments
Authentic	The candidate's own work
Equality	A state of fair treatment that is the right of all people regardless of differences in, for example, culture, ability, gender race, religion, wealth, sexual orientation, or any other group characteristic
Diversity	Acknowledging that each individual is unique, and recognising our individual differences in, for example, culture, ability, gender, race, religion, wealth, sexual orientation, or any other individual characteristic
Identify and collect evidence	Cymhwyso gwybodaeth a sgiliau newydd i atgyfnerthu dysgu, gwella eich arfer eich hun, ac adolygu effeithiolrwydd y wybodaeth a sgil newydd a gafwyd
Reliable	Consistently achieves the same results with the same (or similar) group of learners
Requirements	These could be the requirements of the practitioner's own organisation or those of an external organisation, such as an awarding organisation
Risk assessment	This could be a formal and written risk assessment but could be informal and dynamic – monitoring and controlling risk on an ongoing basis. Risk includes health and safety but may also cover other types of risk, for example the risk of problems arising which interfere with the assessment process, or the risk of using inappropriate assessment methods

Sufficient	Enough evidence as specified in Evidence Requirements or Assessment Strategy
Valid	Relevant to the criteria against which the candidate is being assessed
Fair	Ensuring that everyone has an equal chance of getting an accurate assessment
Safe	This covers both physical and psychological safety. It also includes ensuring that assessment evidence is safe in the sense that is sufficiently robust to make a reliable judgement that the learner does meet the assessment standard

■ The Standard

Performance criteria Learning and development practitioners:	Knowledge and understanding Learning and development practitioners know and understand:
<p>9.1 Ensure learners understand the purpose, requirements and processes of assessment</p> <p>9.2 Plan assessment to meet requirements and learner needs</p> <p>9.3 Use valid, fair, reliable and safe assessment methods</p> <p>9.4 Identify and collect evidence that is:</p> <ul style="list-style-type: none"> • valid • authentic • sufficient <p>9.5 Make assessment decisions against specified criteria</p> <p>9.6 Provide feedback to the learner that affirms achievement and identifies any additional requirements</p> <p>9.7 Maintain required records of the assessment process, its outcomes and learner progress</p> <p>9.8 Work with others to ensure the standardisation of assessment practice and outcomes</p>	<p>KU1 The key concepts and principles of assessment</p> <p>KU2 The range of information that should be made available to learners</p> <p>KU3 The current criteria against which assessments are made and the current regulations and requirements relating to their assessment</p> <p>KU4 Guidelines for assessment planning as appropriate to own area of responsibility</p> <p>KU5 How to involve learners in the planning of assessments</p> <p>KU6 How assessment arrangements can be adapted to meet the needs of individual learners</p> <p>KU7 The uses, benefits and drawbacks of different assessment methods, including the use of simulation and those that involve the use of technology</p> <p>KU8 The types of risks that may be involved in the assessment process and how to manage these</p>

Performance criteria Learning and development practitioners:	Knowledge and understanding Learning and development practitioners know and understand:
	<p>KU9 Issues related to equality, diversity and, where relevant, bilingualism, that may affect the assessment process and how to address these</p> <p>KU10 How to make sure that assessment decisions are made against specified criteria and are valid, reliable and fair</p> <p>KU11 How to determine when evidence is sufficient to make an assessment decision</p> <p>KU12 How to judge the authenticity and currency of evidence and what to do when there is doubt</p> <p>KU13 How to record and store assessment decisions, who they should be made available to and the data protection and confidentiality guidelines that should be followed</p> <p>KU14 Factors to consider when providing feedback to learners</p> <p>KU15 The relevant procedures when there are disputes concerning assessment</p> <p>KU16 Standardisation processes and how to contribute to these</p> <p>KU17 How to co-operate and work effectively with others involved in the assessment process</p> <p>KU18 The value and purpose of continuing professional development for assessment practitioners</p>

Standard 10:

Reflect on, develop and maintain own skills and practice in learning and development

What this standard is about

This standard is about reflecting on current practice, identifying own learning and development needs and taking part in continuing professional development.

Terminology

Within this standard the following explanations and examples apply.

Role	This describes the job that you are contracted to carry out and the work that you must do
Practice	This refers to the 'way' that you carry out your work and takes account of factors such as your approach to your work

The standard

Performance criteria Learning and development practitioners:	Knowledge and understanding Learning and development practitioners know and understand:
<p>10.1 Identify current performance requirements relevant to your practice</p> <p>10.2 Identify trends and developments relevant to own skills, knowledge and practice</p> <p>10.3 Identify and critically reflect on how own beliefs and attitudes influence own practice</p> <p>10.4 Seek feedback, collect information and continually reflect on own performance</p> <p>10.5 Assess the extent to which own practice is inclusive and promotes equality and diversity</p>	<p>KU1 The extent and limitations of the requirements and responsibilities associated with own role</p> <p>KU2 The health and safety practice and personal and social skills relevant to own area of work and management of own workload</p> <p>KU3 Team, organisational and own professional goals</p> <p>KU4 How to explore current performance requirements relevant to own practice, including role descriptors, standards, benchmarks, codes of practice, and values and principles relevant to own practice</p>

<p>Performance criteria</p> <p>Learning and development practitioners:</p>	<p>Knowledge and understanding</p> <p>Learning and development practitioners know and understand:</p>
<p>10.6 Review and evaluate own skills, knowledge and practice against available information</p> <p>10.7 Prioritise areas for development and plan how learning and development will be achieved</p> <p>10.8 Inform relevant individuals and use appropriate systems to report and address factors that impact negatively on own practice</p> <p>10.9 Access development needed to carry out own work more effectively and continually use a range of resources to keep own knowledge, skills and practice up to date</p> <p>10.10 Keep records of own actions, development plans and progress, and use them to support and inform ongoing reflective practice</p> <p>10.11 Apply new knowledge and skills to consolidate learning, improve own practice, and review the effectiveness of newly acquired knowledge and skills</p> <p>10.12 Share knowledge, skills and improvements to practice with colleagues where it is likely to be of benefit</p>	<p>KU5 How to find out about and stay abreast of trends and developments relevant to own skills, knowledge and practice including those relating to technological developments</p> <p>KU6 Effective methods for assessing own values, beliefs and attitudes relevant to own skills and practice</p> <p>KU7 Why it is important to understand own values, beliefs and attitudes and how it can affect own work practice as well as own learning and development</p> <p>KU8 Why it is important to seek feedback on own performance from all those involved in the learning process and ways that this can be done</p> <p>KU9 The type of information that should be collected to inform a review of own skills, knowledge and practice</p> <p>KU10 Ways to continuously reflect on and evaluate own efficiency and effectiveness and why this is important</p> <p>KU11 Methods that can be used to assess the extent to which own practice is inclusive and promotes equality and diversity</p> <p>KU12 Methods that can be used to evaluate own skills knowledge and practice and the range of information that should be used to inform this process</p> <p>KU13 The information that should be considered in the prioritisation of own learning and development needs</p> <p>KU14 Sources and methods of relevant continuous and professional development to facilitate own learning</p>

<p>Performance criteria</p> <p>Learning and development practitioners:</p>	<p>Knowledge and understanding</p> <p>Learning and development practitioners know and understand:</p>
	<p>KU15 How research can help to update practice</p> <p>KU16 Methods, systems and processes for sharing evaluation information and suggesting improvements</p> <p>KU17 How to provide constructive criticism when suggesting improvements to colleagues</p> <p>KU18 Why it is important to keep records of own actions, development plans and progress and how these can be used to inform ongoing reflective practice</p> <p>KU19 Why it is important to evaluate the effectiveness of learning resources and learning provision used for own learning and development and who this information should be shared with</p> <p>KU20 How sharing good practice with others can help to develop own practice</p> <p>KU21 The importance of continuous professional development and collaborative reflection on learning development practice</p>

Standard 11:

Internally monitor and maintain the quality of assessment

What this standard is about

This standard is about monitoring assessment processes and decisions within an organisation, and helping to maintain and improve the quality of assessment.

Terminology

Within this standard the following explanations and examples apply.

Assessment method	For example observation, questioning, checking products of work, setting assignments
Candidate	The learner being assessed
Equality	A state of fair treatment that is the right of all people regardless of differences in culture, ability, gender race, religion, wealth, sexual orientation, or any other group characteristic
Diversity	Acknowledging that each individual is unique, and recognising our individual differences in culture, ability, gender, race, religion, wealth, sexual orientation, or any other individual characteristic
Organisation	For example an awarding organisation, internal department or any other organisation involved in assessment
Reliable	Consistently achieves the same results with the same (or similar) group of learners
Requirements for their role	This could include holding an assessor qualification and/or being expert in the subject being assessed
Sufficient	Enough evidence as specified in Evidence Requirements or Assessment Strategy.
Valid	Relevant to the criteria against which the candidate is being assessed

■ The standard

<p>Performance criteria</p> <p>Learning and development practitioners:</p>	<p>Knowledge and understanding</p> <p>Learning and development practitioners know and understand:</p>
<p>11.1 Plan and prepare monitoring activities according to the requirements of own role</p> <p>11.2 Determine whether assessment processes and systems meet and operate according to quality requirements</p> <p>11.3 Check that assessors meet the requirements for their role</p> <p>11.4 Check that assessments are planned, prepared for and carried out according to agreed procedures</p> <p>11.5 Check that assessment methods are safe, fair, valid and reliable</p> <p>11.6 Check that assessment decisions are made using specified criteria</p> <p>11.7 Compare assessor decisions to ensure they are consistent</p> <p>11.8 Provide assessors with feedback, advice and support to help them maintain and improve their assessment practice</p> <p>11.9 Work with others to ensure the standardisation of assessment practice and outcomes</p> <p>11.10 Follow agreed procedures when there are significant concerns about the quality of assessment</p> <p>11.11 Follow agreed procedures for the recording, storing, reporting and confidentiality of information</p>	<p>KU1 The current quality requirements for assessment processes and systems in their area of responsibility</p> <p>KU2 The key concepts and principles of quality assurance</p> <p>KU3 The key concepts and principles of assessment</p> <p>KU4 The role of the assessor and the relevant requirements of the role</p> <p>KU5 The roles of those involved in maintaining the quality of assessment and the relevant requirements of these roles</p> <p>KU6 The agreed procedures for planning, preparing for and carrying out assessments</p> <p>KU7 Techniques for sampling evidence of assessment, including making appropriate use of technology</p> <p>KU8 Appropriate criteria for judging the quality of the assessment process</p> <p>KU9 How to ensure the health and safety of the learner is maintained during assessment</p> <p>KU10 The uses, benefits and drawbacks of different assessment methods</p> <p>KU11 The types of feedback, support and advice that assessors need and how to meet these needs</p> <p>KU12 Issues related to equality, diversity and if relevant, bilingualism, that may affect assessment and quality assurance, and how to address these</p>

<p>Performance criteria Learning and development practitioners:</p>	<p>Knowledge and understanding Learning and development practitioners know and understand:</p>
	<p>KU13 Procedures to follow when there are concerns about the quality of assessment: when and how to use them</p> <p>KU14 Standardisation processes and how to co-ordinate and contribute to these</p> <p>KU15 The procedures to follow when there are disputes concerning assessment and quality assurance</p> <p>KU16 Procedures to follow when planning and preparing for, carrying out and recording monitoring activity</p> <p>KU17 The requirements for information management, data protection and confidentiality in relation to assessment and quality assurance</p> <p>KU18 The value and purpose of continuing professional development for assessment and quality assurance practitioners</p>

Standard 12:

Externally monitor and maintain the quality of assessment

What this standard is about

This standard is about monitoring assessment processes and decisions from outside an organisation, and helping to maintain and improve relevant quality assurance systems.

Terminology

Assessment method	Ways of measuring learning and development, for example observation, questioning, checking products of work, setting assignments
Equality	A state of fair treatment that is the right of all people regardless of differences in, for example, culture, ability, gender race, religion, wealth, sexual orientation, or any other group characteristic
Diversity	Acknowledging that each individual is unique, and recognizing our individual differences in, for example, culture, ability, gender, race, religion, wealth, sexual orientation, or any other individual characteristic
Staff competence	This could include holding an assessor qualification and/or being expert in the subject being assessed

The standard

Performance criteria	Knowledge and understanding
Learning and development practitioners:	Learning and development practitioners know and understand:
12.1 Plan, communicate and establish procedures for the external monitoring of quality assurance systems as required	KU1 The key concepts and principles of assessment
12.2 Check that internal quality assurance systems and administrative arrangements meet current requirements	KU2 The key concepts and principles of quality assurance
12.3 Check that staffing and staff competence, assessment arrangements, methods and decisions meet requirements	KU3 The role of the assessor and internal quality assurance staff and the current relevant requirements to undertake these roles
12.4 Provide advice and support to help improve internal quality assurance and assessment arrangements and practices	KU4 The current requirements that must be met for internal and external quality assurance
	KU5 The current requirements that must be met for internal assessment arrangements and practices
	KU6 How to monitor and evaluate internal quality

Performance criteria Learning and development practitioners:	Knowledge and understanding Learning and development practitioners know and understand:
<p>12.5 Work with others to ensure the standardisation of assessment practice and outcomes</p> <p>12.6 Follow the agreed procedures when internal quality assurance and assessment arrangements and practices do not meet requirements</p> <p>12.7 Follow agreed procedures for the recording, storing, reporting and confidentiality of information</p>	<p>assurance arrangements and practices, including the use of technology</p> <p>KU7 How to monitor and evaluate internal assessment arrangements and practices, including the use of technology</p> <p>KU8 The procedures to follow when internal quality assurance and assessment arrangements do not meet requirements</p> <p>KU9 The types of support and advice that organisations need on internal quality assurance and assessment arrangements and practices</p> <p>KU10 The importance of providing consistent support and advice that follows agreed guidance and requirements</p> <p>KU11 How to adapt monitoring and evaluation approaches in relation to customer need without compromising standards</p> <p>KU12 Issues related to equality, diversity and if relevant, bilingualism, that may affect assessment and quality assurance and how to address these</p> <p>KU13 Different methods of providing appropriate support and advice in line with own organisation's guidance</p> <p>KU14 Record keeping procedures relating to external quality assurance</p> <p>KU15 The requirements for information management relating to external quality assurance</p> <p>KU16 The requirements for data protection and confidentiality in relation to external quality assurance</p> <p>KU17 The value and purpose of continuing professional development for assessment and quality assurance practitioners</p>

Standard 13:

Evaluate and improve learning and development provision

What this standard is about

This standard is about evaluating learning and development provision and planning/implementing quality improvements.

Terminology

Evidence	This could be, for example, learner progress, learner attainment, learner satisfaction, staff engagement as appropriate to the quality indicators
Quality requirements	These could be, for example, organisational, legal/statutory, funding or awarding organisation requirements
Scope	What the evaluation will cover

The standard

Performance criteria Learning and development practitioners:	Knowledge and understanding Learning and development practitioners know and understand:
<p>13.1 Identify the purpose and scope of the evaluation</p> <p>13.2 Identify quality requirements and appropriate measures of performance</p> <p>13.3 Identify methods for monitoring, collecting, managing and analysing data</p> <p>13.4 Collect and analyse data according to identified monitoring procedure</p> <p>13.5 Identify strengths and areas for improvement</p> <p>13.6 Evaluate own contribution to working within quality systems</p> <p>13.7 Ensure that potential improvements are realistic and achievable</p>	<p>KU1 The key concepts and principles of quality assurance and continuous improvement</p> <p>KU2 The quality requirements appropriate to own work context and work role</p> <p>KU3 How to research and keep up to date with quality requirements relevant to learning and development</p> <p>KU4 Industry recognised standards relevant to learning and development and the processes and activities which deliver excellence in the work context being evaluated</p> <p>KU5 How to identify performance indicators relevant to the area of learning and development being evaluated</p>

Performance criteria Learning and development practitioners:	Knowledge and understanding Learning and development practitioners know and understand:
<p>13.8 Work with others to plan and implement improvements to learning and development</p> <p>13.9 Monitor and evaluate the impact of improvements</p>	<p>KU6 How to set realistic targets, the contribution that targets can make to evaluation processes and the drawbacks associated with target driven work</p> <p>KU7 The strengths and weaknesses of different monitoring and information collection methods and how to develop and administer these methods</p> <p>KU8 The range, amount and frequency of data – including qualitative and quantitative – that needs to be collected and analysed to give valid information about quality</p> <p>KU9 The contribution that technology can make to the monitoring and evaluation process</p> <p>K10 The principles of information management and how to establish systems for the monitoring and management of qualitative and quantitative data</p> <p>KU11 Processes, procedures and methods involved in data analysis and interpretation</p> <p>KU12 What to monitor for specific purposes and how to record and store it</p> <p>KU13 How to contribute to self-assessment and evaluation processes</p> <p>KU14 The role and functions of individuals and teams in improving quality and raising standards</p> <p>KU15 The importance of involving the learner in quality improvement</p> <p>KU16 How to encourage the learner to contribute to self-assessment processes</p>

<p>Performance criteria Learning and development practitioners:</p>	<p>Knowledge and understanding Learning and development practitioners know and understand:</p>
	<p>KU17 The impact of the wider learning environment on the learner experience</p> <p>KU18 How to use feedback to develop own practice specific to the relevant quality systems</p> <p>KU19 How to act on the outcomes of quality assurance, including self-assessment and evaluation</p> <p>KU20 How to contribute to quality improvement plans</p> <p>KU21 How to work with those involved in the learning process to influence and implement quality improvement</p> <p>KU22 The confidentiality and data protection legislation relevant to the collection and storage of information in learning and development</p>



This information is available in alternative formats from Lifelong Learning UK

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