

# Next Generation Higher National Unit Specification

## Exercise Practitioner 2 (SCQF level 8)

**Unit code:** J7CB 48  
**SCQF level:** 8 (24 SCQF credit points)  
**Valid from:** session 2024–25

### **Prototype unit specification for use in pilot delivery only (version 2.0) August 2024**

This unit specification provides detailed information about the unit to ensure consistent and transparent assessment year on year.

This unit specification is for teachers and lecturers and contains all the mandatory information required to deliver and assess the unit.

The information in this unit specification may be reproduced in support of SQA qualifications only on a non-commercial basis. If it is reproduced, SQA must be clearly acknowledged as the source. If it is to be reproduced for any other purpose, written permission must be obtained from [permissions@sqa.org.uk](mailto:permissions@sqa.org.uk).

This edition: August 2024 (version 2.0)

© Scottish Qualifications Authority 2023, 2024

## Unit purpose

This unit enables learners to develop a broad understanding of the principles and practices of being a personal trainer practitioner, and leading individual and/or group exercise sessions in different environments. It provides learners with the knowledge and skills to plan, teach and evaluate safe and effective individual and/or group personal training sessions. It also provides learners with the knowledge and skills to analyse factors that affect a healthy lifestyle, wellbeing of clients and behaviour change.

The unit covers the principles of nutrition, nutritional strategies and nutritional assessment tools that can be used with clients. Learners develop knowledge and skills of how to set up a personal training business, including knowledge of marketing, finance and ethical practices. Learners develop their own meta-skills in a vocational context, and develop sustainability knowledge and understanding linked to the [United Nations Sustainable Development Goals](#) (UN SDGs).

## Entry requirements

Learners must have completed one of the following qualifications before undertaking the Professional Development Award (PDA) in Personal Trainer:

- ◆ Higher National Certificate (HNC) Physical Activity and Health
- ◆ HNC Fitness, Health and Exercise
- ◆ an industry-recognised fitness qualification, for instance Gym Instructor or Group Exercise Instructor

Centres must ensure learners undertaking the qualification are at least 16 years old prior to the course start date due to Student Public Liability Insurance requirements.

We recommend that learners have some experience and/or participation in a sport or fitness environment. We also recommend that learners possess communication skills to a level equivalent to at least SCQF level 6.

The unit is a mandatory unit in the Next Generation: Higher National Diploma (HND) in Physical Activity and Health (SCQF level 8) or can be delivered as a stand-alone unit. You can teach the unit in conjunction with the Exercise Practitioner 2 (3-credit) unit as part of the PDA in Personal Training (SCQF level 8).

## Unit outcomes

Learners who complete this unit can:

- 1 critically analyse the key components of a healthy lifestyle and factors that affect health and wellbeing
- 2 compare a range of evidence-based theories and approaches that can motivate positive behaviour change with clients
- 3 deliver an individual or group training intervention for a client or clients
- 4 evaluate the individual or group training intervention for a client or clients
- 5 examine the principles of nutrition, nutritional strategies and use of nutritional assessment tools when working with a client or clients
- 6 construct a business plan recognising the importance of business acumen, marketing, finance and ethical practices
- 7 develop own meta-skills in a vocational context
- 8 develop sustainability knowledge and understanding, and skills to support clients in the physical activity and health sector

## Evidence requirements

Learners can generate evidence through stand-alone assignments or portfolio work.

### **Critically analyse the key components of a healthy lifestyle and factors that affect health and wellbeing (outcome 1)**

Learners must successfully:

- ◆ critically analyse a range of health conditions and medically controlled diseases, including causes, symptoms and treatment
- ◆ critically analyse factors that can affect health and wellbeing, such as smoking, nutrition, stress, personal circumstances, training and relaxation
- ◆ research components of a healthy lifestyle that have an impact on both physical and mental wellbeing
- ◆ educate clients on the components of a healthy lifestyle and state what advice they would offer them (within scope of practice)

### **Compare a range of evidence-based theories and approaches that can motivate positive behaviour change with clients (outcome 2)**

Learners must successfully:

- ◆ compare a range of behaviour change theories and how they can be applied in a real-life context with clients
- ◆ research psychological factors that can influence behaviour change
- ◆ evaluate a range of approaches that can motivate positive behaviour change
- ◆ integrate appropriate motivational strategies to encourage long-term adherence to exercise and other positive lifestyle practices

### **Outcomes 3, 4 and 5**

Learners must choose a client group from the list below:

- ◆ sedentary
- ◆ recovering from an injury
- ◆ over-trained
- ◆ high-level performer
- ◆ sport-specific performer
- ◆ clients with low-risk health conditions

### **Deliver an individual or group training intervention for a client or clients (outcome 3)**

Learners must successfully:

- ◆ deliver a minimum of 6 weeks of their planned 12-week programme. Observe learners delivering one session by using an observation checklist for a minimum of 45 minutes, ensuring client or clients' safety and wellbeing at all times
- ◆ explain and deliver safe, effective and appropriate warm-up and cool-down activities to client or clients
- ◆ utilise appropriate teaching methods to instruct from previously planned sessions for:
  - cardiovascular exercise
  - resistance exercise
  - functional exercise
  - flexibility exercise
- ◆ provide instructions and demonstrations that are technically correct, are safe and make effective use of the selected environment
- ◆ analyse clients' performance, and provide feedback appropriate to:
  - client or clients' goals
  - correct techniques as required
  - progress or modify exercises
- ◆ observe and adapt exercise technique of the personal training client or clients during the sessions
- ◆ professionally interact with client or clients and relevant professionals, and use effective communication techniques
- ◆ know how to observe and monitor client or clients during sessions to maintain safety and effectiveness of exercise
- ◆ recognise personal barriers to exercise and use strategies for clients to overcome them

### **Evaluate the individual or group training intervention for a client or clients (outcome 4)**

Learners must successfully:

- ◆ evaluate individual or group training sessions against session aims for a minimum of 6 weeks of the planned 12-week programme
- ◆ review own coaching performance
- ◆ give feedback to client or clients on their performance in the sessions
- ◆ amend and improve future sessions based on the evaluation and the client feedback
- ◆ explain how they professionally interacted with client or clients and relevant professionals using effective communication techniques
- ◆ explain what advice and guidance they offered to the client in scope of practice to promote positive healthy lifestyle choices
- ◆ educate client about own role, responsibilities and limitations in providing assistance, for example scope of practice
- ◆ explain how one of the delivered sessions can be adapted for working in different facilities and environments, such as indoors and outdoors

### **Examine the principles of nutrition, nutritional strategies and use of nutritional assessment tools when working with a client or clients (outcome 5)**

Learners must successfully:

- ◆ research the principles of nutrition, including:
  - the main nutrients and their food sources
  - functions of macronutrients
  - micronutrients and hydration and the influence of nutrition on health
- ◆ research nutritional strategies used with clients to improve nutritional status and know methods to estimate resting metabolic rate and energy requirements to support the achievement of client goals
- ◆ analyse clients' seven-day nutrition diary, comparing their results to both the recommended government healthy eating guidelines and other current evidence-based recommendations
- ◆ incorporate the use of nutritional assessment tools to identify clients' dietary habits, then educate and encourage them to make good food choices according to their health and nutrition needs (within scope of practice)
- ◆ examine how nutrition recommendations would differ for clients in relation to:
  - weight management and health
  - hypertrophy
  - sports performance

## **Construct a business plan recognising the importance of business acumen, marketing, finance and ethical practices (outcome 6)**

### **Business acumen, marketing and finance**

Learners must successfully develop an initial personal training business plan. The aims and objectives of the business plan must include:

- ◆ key performance indicators
- ◆ target client groups
- ◆ how they plan to grow and retain clients
- ◆ marketing strategies and techniques that will be used to promote the business, including social media
- ◆ resources required to set up and run the business
- ◆ tax and insurance legislation
- ◆ self-employed or employed UK requirements
- ◆ marketing and sales
- ◆ recording and managing data

### **Ethical practices**

Learners must successfully include:

- ◆ an evaluation of how their own practices are ethical and legislative
- ◆ how they will comply with insurance for personal and public liability
- ◆ how they will conduct themselves and portray a professional image
- ◆ an evaluation of a range of digital devices, to show how they can support clients and increase the customer experience. Examples include:
  - wearable technology
  - pedometers
  - mobile applications

### **Develop own meta-skills in a vocational context (outcome 7)**

Learners must successfully:

- ◆ undertake a self-assessment of their own meta-skills baseline
- ◆ create a plan for their own meta-skills development
- ◆ undertake activities to develop and demonstrate meta-skills
- ◆ use reflective practice to monitor and assess the meta-skills they have improved or developed

### **Develop sustainability knowledge and understanding, and skills to support clients in the physical activity and health sector (outcome 8)**

Learners must successfully:

- ◆ identify and describe sustainability in the context of the SDGs
- ◆ explain how one product or process relevant to physical activity and health could be made more sustainable and help meet the aims of at least two selected SDGs

There is potential for the outcome to be linked with meta-skills development for self-management, social intelligence and innovation.

See the Educator Guide for more information.

We recommend that evidence for outcomes 7 and 8 is collected holistically in the form of a project.

## Knowledge and skills

The following table shows the knowledge and skills covered by the unit outcomes:

Knowledge	Skills
<p><b>Outcome 1</b> Learners should understand:</p> <ul style="list-style-type: none"><li>◆ components of a healthy lifestyle and factors that affect health and wellbeing, for example:<ul style="list-style-type: none"><li>— smoking</li><li>— alcohol</li><li>— nutrition</li><li>— physical activity levels and preferences</li><li>— weight management</li><li>— rest and relaxation</li><li>— relaxation training</li><li>— stress (signs, symptoms, effects and management)</li><li>— work patterns</li><li>— job roles</li><li>— relevant personal circumstances</li><li>— posture</li></ul></li><li>◆ how to educate clients on the components of a healthy lifestyle</li><li>◆ a range of health conditions and medically controlled diseases</li></ul>	<p><b>Outcome 1</b> Learners can:</p> <ul style="list-style-type: none"><li>◆ offer advice and guidance within the scope of practice to promote positive healthy lifestyle choices</li></ul>



Knowledge	Skills
<p><b>Outcome 1 (continued)</b> Learners should understand:</p> <ul style="list-style-type: none"><li>◆ common conditions and diseases, for example:<ul style="list-style-type: none"><li>— obesity</li><li>— osteoporosis</li><li>— mental health problems (stress, depression, anxiety)</li><li>— back pain</li><li>— hypertension</li><li>— angina</li><li>— coronary heart disease (CHD)</li><li>— pre-diabetes and diabetes</li><li>— prevalent forms of arthritis</li><li>— stroke</li><li>— cancer</li><li>— asthma</li><li>— chronic obstructive pulmonary disease (COPD)</li><li>— chronic fatigue</li><li>— eating disorders</li></ul></li></ul>	

Knowledge	Skills
<p><b>Outcome 2</b>                      Learners should understand:</p> <ul style="list-style-type: none"> <li>◆ psychological factors that can influence change, for example:                             <ul style="list-style-type: none"> <li>— intrinsic and extrinsic motivation, social support and peer pressure</li> <li>— individual client needs and differences, for example experienced, inexperienced, active, inactive</li> <li>— motives and barriers to change: perceived and actual, self-recognition of own barriers, reinforcement</li> <li>— self-efficacy</li> </ul> </li> <li>◆ the relevance and use of psychological questionnaires</li> <li>◆ understand a range of theories and/or approaches that can motivate positive behaviour change, for example:                             <ul style="list-style-type: none"> <li>— motivational theories, approaches such as: arousal theories, stages of change and/or the transtheoretical model, motivational interviewing</li> <li>— how to identify a client’s readiness to change and the characteristics of an individual at each stage of change</li> </ul> </li> </ul>	<p><b>Outcome 2</b>                      Learners can:</p> <ul style="list-style-type: none"> <li>◆ use strategies to identify client’s readiness to change their behaviour, to understand their ‘stage of change’</li> <li>◆ clarify own role, the client’s role and responsibilities and those of any other staff and/or professionals involved in the programme</li> <li>◆ use evidence-based strategies and techniques to create a positive, motivating and empowering environment that supports clients to participate in exercise</li> <li>◆ integrate appropriate motivational strategies to encourage long-term adherence to exercise and other positive lifestyle practices</li> <li>◆ recognise personal barriers to exercise and use strategies to overcome them</li> <li>◆ set specific, measurable, attainable, realistic and timely (SMART) goals linked to a client’s individual needs, wants and motivators</li> <li>◆ monitor targets, review and evaluate progress, adapt accordingly</li> <li>◆ use strategies to maintain contact and motivate clients between sessions, for example, phone calls, emails, social media</li> </ul>

Knowledge	Skills
<p><b>Outcome 2 (continued)</b>                      Learners should understand:</p> <ul style="list-style-type: none"> <li>◆ appropriate interventions and/or strategies to use at each stage, for example:                             <ul style="list-style-type: none"> <li>— decisional balance sheet, pros and cons, cost-benefit analysis</li> <li>— fitness testing</li> <li>— overcoming barriers</li> <li>— goal setting</li> <li>— behavioural modification techniques</li> <li>— planning for relapse, contingency planning</li> <li>— rewards</li> <li>— focusing</li> <li>— support systems</li> <li>— reinforcement strategies</li> <li>— self-monitoring</li> </ul> </li> </ul>	

Knowledge	Skills
<p><b>Outcome 3</b> Learners should understand:</p> <ul style="list-style-type: none"> <li>◆ how to utilise appropriate teaching methods and skills to instruct: <ul style="list-style-type: none"> <li>— cardiovascular exercise, for example steady state, interval, fartlek</li> <li>— resistance exercise, for example a range of training systems, exercise equipment, fixed and free weight</li> <li>— functional exercise, for example movement patterns, muscle actions and components of fitness that mirror a client’s functional requirements</li> <li>— flexibility exercise, including static, ballistic, dynamic and proprioceptive neuromuscular techniques (including the myotatic stretch reflex) to facilitate increased range of motion</li> </ul> </li> <li>◆ how to observe and monitor clients during an exercise session to ensure safety and effectiveness by: <ul style="list-style-type: none"> <li>— utilising explanations and demonstrations that are technically correct, safe and appropriate to the individual client</li> <li>— correcting exercise technique to ensure safe and effective alignment, execution and use of equipment</li> <li>— providing client-specific instructing points, feedback, encouragement and reinforcement</li> <li>— offering adaptations and alternatives that meet a client’s individual needs and circumstances (progression, regression, corrective strategies and alternative exercises as required)</li> </ul> </li> </ul>	<p><b>Outcome 3</b> Learners can:</p> <ul style="list-style-type: none"> <li>◆ observe and monitor clients during sessions to maintain safety and effectiveness of exercise: <ul style="list-style-type: none"> <li>— identify poor and/or incorrect exercise technique</li> <li>— adapt, regress, progress and apply corrective strategies as required</li> <li>— identify signs and symptoms that indicate an unplanned change in intensity, for example excessive and/or insufficient effort</li> <li>— modify and adapt exercises for a range of individual needs, for example offer alternatives that regress or progress an exercise</li> </ul> </li> <li>◆ utilise appropriate teaching methods and skills to instruct: <ul style="list-style-type: none"> <li>— cardiovascular exercise, for example steady state, interval, fartlek</li> <li>— resistance exercise, for example a range of training systems, exercise equipment, fixed and free weight</li> <li>— functional exercise, for example movement patterns, muscle actions and components of fitness that mirror a client’s functional requirements</li> <li>— flexibility exercise, including static, ballistic, dynamic and proprioceptive neuromuscular techniques (including the myotatic stretch reflex) to facilitate increased range of motion</li> </ul> </li> </ul>

Knowledge	Skills
<p><b>Outcome 3 (continued)</b>                      Learners should understand:</p> <ul style="list-style-type: none"> <li>◆ how to modify and adapt exercises, sessions and programmes for a range of individual needs</li> <li>◆ how to professionally interact with clients and relevant professionals, including:                             <ul style="list-style-type: none"> <li>— how to introduce oneself</li> <li>— rapport building</li> <li>— connecting with people to create a positive experience</li> <li>— adapting communication style to suit client needs</li> <li>— presenting accurate information, for example using sensitivity, discretion, a non-judgemental manner, respecting the individuality of the client, ensuring that the language and terms are understood by the client, trying to simplify technical information</li> </ul> </li> <li>◆ different communication techniques and how to use them, for example using:                             <ul style="list-style-type: none"> <li>— observation, non-verbal techniques, observing body language</li> <li>— negotiation</li> <li>— open and/or closed questioning</li> <li>— motivational interviewing techniques, for example developing ‘importance’, ‘confidence’ and ‘readiness’</li> <li>— techniques to deal with resistance to change</li> <li>— reflective statements</li> <li>— paraphrasing</li> <li>— summarising</li> <li>— decisional balance sheet</li> <li>— active listening</li> </ul> </li> </ul>	<p><b>Outcome 3 (continued)</b>                      Learners can:</p> <ul style="list-style-type: none"> <li>◆ use a range of communication techniques to:                             <ul style="list-style-type: none"> <li>— introduce oneself</li> <li>— build rapport</li> <li>— create a positive customer experience</li> <li>— suit the client’s needs, for example their stage of change</li> </ul> </li> <li>◆ present clear and accurate information</li> <li>◆ deliver sessions in different environments, for example gym, studio or sports hall, outdoors, client’s home or other confined space</li> <li>◆ deliver sessions for either individuals or small groups</li> </ul>

Knowledge	Skills
<p><b>Outcome 4</b> Learners should understand:</p> <ul style="list-style-type: none"> <li>◆ the variables of training and how to tailor exercise programmes to support goal achievement</li> <li>◆ how to manipulate the FITT principle to tailor exercise programmes, for example by using: <ul style="list-style-type: none"> <li>— a choice of exercises</li> <li>— a sequence of exercise</li> <li>— resistance and repetitions</li> <li>— a number of sets</li> <li>— a rest between sets (recovery)</li> <li>— speed of movement</li> <li>— a type of muscle contraction</li> <li>— a set duration of session, rest between sessions</li> <li>— volume of training</li> <li>— split routines</li> <li>— the development of aerobic and anaerobic cardiovascular (CV) fitness</li> <li>— strength</li> <li>— endurance</li> <li>— hypertrophy</li> <li>— speed</li> <li>— power</li> </ul> </li> </ul>	<p><b>Outcome 4</b> Learners can:</p> <ul style="list-style-type: none"> <li>◆ evaluate the session against: <ul style="list-style-type: none"> <li>— session aims</li> <li>— SMART goals</li> <li>— activities</li> <li>— participant performance</li> <li>— own performance (preparation, delivery)</li> <li>— health and safety</li> </ul> </li> <li>◆ review client goals based on outcomes and revise programme accordingly</li> <li>◆ amend and improve future session plans and own performance based on evaluation and feedback from the client, for example according to chosen activities, exercise intensity, changes in circumstances</li> <li>◆ give feedback to client based on review (timely, positive, relevant to goals, etc)</li> </ul>

Knowledge	Skills
<p><b>Outcome 5</b> Learners should understand:</p> <ul style="list-style-type: none"> <li>◆ the main nutrients and their food sources</li> <li>◆ food sources of carbohydrate, fats (saturated, unsaturated, essential fatty acids), protein, vitamins, minerals, water</li> <li>◆ the importance of hydration, macronutrients and micronutrients and their functions</li> <li>◆ the influence of nutrition on health, for example obesity, cholesterol, omega-3 and omega-6 ratio, cancer risk</li> <li>◆ current government healthy eating guidelines and evidence-based recommendations and how they can be applied to individual clients to cover: <ul style="list-style-type: none"> <li>— weight management and health</li> <li>— hypertrophy</li> <li>— sports performance</li> </ul> </li> <li>◆ how to educate and encourage clients to make good food choices: refer to 'Lifestyle management and client motivation' (in outcome 1) and 'Communication' (in outcome 3) for range guidance</li> <li>◆ how to incorporate the use of nutritional assessment tools, for example food diaries, food recall and food frequency questionnaires, body composition assessments</li> <li>◆ methods to estimate resting metabolic rate and energy requirements, to support the achievement of client goals</li> </ul>	<p><b>Outcome 5</b> Learners can:</p> <ul style="list-style-type: none"> <li>◆ use appropriate nutritional assessment tools to identify client's dietary habits</li> <li>◆ analyse client's dietary habits and identify areas for improvement within the scope of practice</li> <li>◆ use appropriate strategies to educate and encourage clients about healthy eating within the scope of practice and current government guidelines</li> <li>◆ distinguish between credible and non-credible sources of nutritional information and guidance</li> <li>◆ provide clients with appropriate information and/or signposting according to their individual health and nutrition needs</li> </ul>

Knowledge	Skills
<p><b>Outcome 6</b>                      Learners should understand:</p> <ul style="list-style-type: none"> <li>◆ how IT systems support:                             <ul style="list-style-type: none"> <li>— finance and accounting</li> <li>— marketing and sales</li> <li>— record keeping and managing data</li> </ul> </li> <li>◆ how data can be monitored and interpreted using a range of available systems, for example Customer Relationship Management (CRM), social media</li> <li>◆ how technological advancements can be used to support the customer experience, and to increase physical activity levels, motivation and focus, for example wearable technology, pedometers, mobile phone applications</li> <li>◆ current legislation and ethical practice that affects the use of technology, for example:                             <ul style="list-style-type: none"> <li>— the Data Protection Act</li> <li>— intellectual property (IP)</li> <li>— patents and copyright</li> </ul> </li> <li>◆ how to conduct themselves and portray a professional image by understanding:                             <ul style="list-style-type: none"> <li>— how to be positive</li> <li>— how to be honest</li> <li>— how to be empowering</li> <li>— personal integrity</li> <li>— how to be respectful of clients and other professionals</li> <li>— how to be motivating</li> <li>— how to be trustworthy</li> <li>— how to be committed</li> <li>— how to be non-judgemental</li> <li>— how to be consistent</li> <li>— personal conduct</li> <li>— how to be a role model</li> <li>— how to portray a professional image</li> </ul> </li> </ul>	<p><b>Outcome 6</b>                      Learners can:</p> <ul style="list-style-type: none"> <li>◆ use appropriate products and IT to support and manage effective personal training, for example:                             <ul style="list-style-type: none"> <li>— record keeping</li> <li>— sales and invoicing</li> <li>— client and group management</li> <li>— class scheduling</li> <li>— retention levels</li> <li>— session reminders</li> <li>— analysing and interpreting data (and knowing how to present it)</li> </ul> </li> <li>◆ ensure client safety and wellbeing at all times</li> <li>◆ demonstrate compliance with relevant legal responsibilities, for example taking into account:                             <ul style="list-style-type: none"> <li>— health and safety at work</li> <li>— equality and diversity</li> <li>— safeguarding</li> <li>— data protection</li> <li>— hazard identification, safe working practices</li> <li>— ethics and professional conduct</li> </ul> </li> <li>◆ educate their client about own role, responsibilities and limitations in providing assistance, for example scope of practice</li> </ul>



Knowledge	Skills
<p><b>Outcome 6 (continued)</b>                      Learners should understand:</p> <ul style="list-style-type: none"> <li>◆ professional ethics related to own role, for example by:                             <ul style="list-style-type: none"> <li>— having professional membership</li> <li>— showing role boundaries, scope of practice and responsibilities</li> <li>— representing their skills, abilities and knowledge</li> <li>— interfacing with other relevant professionals, business practices and demonstrating a professional code of conduct</li> </ul> </li> <li>◆ current legislation and organisation procedures relevant to own role, including:                             <ul style="list-style-type: none"> <li>— data protection</li> <li>— client confidentiality</li> <li>— conflict of interest</li> <li>— health and safety at work</li> <li>— disclosure and barring service (DBS)</li> <li>— safeguarding children and vulnerable adults</li> <li>— equality and diversity</li> <li>— personal liability insurance</li> <li>— control of substances hazardous to health</li> <li>— reporting of injuries</li> <li>— diseases and dangerous occurrences regulations</li> <li>— electricity at work regulations</li> <li>— first aid regulations</li> <li>— individual organisational policies and procedures</li> </ul> </li> </ul>	

Knowledge	Skills
<p><b>Outcome 6 (continued)</b>                      Learners should understand:</p> <ul style="list-style-type: none"> <li>◆ relevant marketing strategies and techniques, for example brand awareness, including:                             <ul style="list-style-type: none"> <li>— self-promotion</li> <li>— market research (for example, strengths, weaknesses, opportunities and threats (SWOT) or political, economical, social and technological (PEST) analysis)</li> <li>— how to develop a marketing plan</li> </ul> </li> <li>◆ aspects of business planning relevant to own role, for example:                             <ul style="list-style-type: none"> <li>— individual and organisational goals</li> <li>— targets and objectives (such as key performance indicators)</li> <li>— client-facing services and products</li> <li>— sales and how to grow a client base</li> <li>— activities to support business objectives and growth</li> </ul> </li> <li>◆ how to manage own business financials, for example:                             <ul style="list-style-type: none"> <li>— budgeting (forecasting, sales and targets)</li> <li>— profit and loss (for example, gross profit, net gain)</li> <li>— balance sheets</li> <li>— tax and insurance legislation</li> <li>— financial reporting</li> <li>— self-employed and employed UK requirements</li> </ul> </li> </ul>	

Knowledge	Skills
<p><b>Outcome 7</b> Learners should understand:</p> <ul style="list-style-type: none"> <li>◆ meta-skills, including: <ul style="list-style-type: none"> <li>— self-management, social intelligence and innovation, and associated meta-skills, as described in SDS (2018) <a href="#">Skills 4.0: a skills model to drive Scotland's future</a>, Centre for Work-based Learning in Scotland</li> </ul> </li> <li>◆ the importance of developing meta-skills: employability, adaptability, effectiveness</li> <li>◆ specific meta-skills relevant to vocational context: most relevant meta-skills from categories of self-management, social intelligence and innovation</li> <li>◆ self-awareness: analysing preferences, strengths and weaknesses; meta-skills self-assessment</li> <li>◆ goal setting and action planning</li> <li>◆ reflective practice: principles of reflective practice; tools and approaches for effective reflective practice</li> </ul>	<p><b>Outcome 7</b> Learners can:</p> <ul style="list-style-type: none"> <li>◆ plan a strategy for meta-skills development</li> <li>◆ implement and review plans for meta-skills development</li> <li>◆ assess own meta-skills development</li> </ul>
<p><b>Outcome 8</b> Learners should understand:</p> <ul style="list-style-type: none"> <li>◆ sustainability and the UN SDGs</li> <li>◆ subject-specific sustainability issues and how these relate to the SDGs, and potential improvements</li> </ul>	<p><b>Outcome 8</b> Learners can:</p> <ul style="list-style-type: none"> <li>◆ review SDGs and assess own knowledge and understanding</li> <li>◆ review unit content against the SDGs to identify a sustainability-related issue</li> <li>◆ apply knowledge and understanding of sustainability and the SDGs to propose improvement</li> </ul>

## Meta-skills

Throughout the unit, learners develop meta-skills to enhance their employability in the physical activity and health sector.

### Self-management

This meta-skill includes:

- ◆ focusing: sorting information for client personal training programmes; focusing on the client's needs; adapting sessions based on feedback; educating clients on components of a healthy lifestyle; observing and correcting client's technique during sessions; creating a personal training business plan — in outcomes 1, 2, 3, 4, 5 and 6
- ◆ integrity: understanding ethics; being aware of acting on values and principles; work ethic; timekeeping; reliability; discipline; trustworthiness when working with clients in outcomes; undertaking a self-assessment of meta-skills and in the sustainability outcome — in outcomes 3, 4, 5, 6, 7 and 8
- ◆ adapting: adapting teaching styles; decision-making; being responsible; responding to changes when working with clients; reviewing programmes based on evaluations and client feedback — in outcomes 2, 3 and 4
- ◆ initiative: decision making; independent thinking; self-belief; motivation; responsibility when risk assessing and when working with clients in outcomes, evaluating sessions and assessing own meta-skills development — in outcomes 1, 2, 3, 4, 5, 6 and 7

### Social intelligence

This meta-skill includes:

- ◆ communicating: receiving information from clients; giving information; listening to others when working with clients in outcomes — 1, 2, 3, 4 and 5
- ◆ feeling: sense of responsibility; empathy; understanding how others feel when working with clients; sustainability — in outcomes 1, 2, 3, 4, 5 and 8
- ◆ collaborating: operating in different settings; building relationships with clients; working towards shared goals; team-working with other professionals when working with clients in outcomes — in outcomes 1, 2, 3, 4, 5 and 6
- ◆ leading: inspiring and motivating others; influencing others and being a role model; developing others when working with clients; sustainability — in outcomes 1, 2, 3, 4, 5, 6 and 8

### Innovation

This meta-skill includes:

- ◆ curiosity: noticing significant information; asking questions; information sourcing; problem recognition; evaluating sessions and assessing own meta-skills development — in outcomes 1, 2, 3, 4, 5, 6, 7 and 8

NextGen: HN published prototype unit specification for use in pilot delivery only (version 2.0)  
August 2024

- ◆ creativity: creating enjoyable programmes and sessions for clients; using different nutritional assessment tools with clients, responding to different situations and adapting; motivating clients in different ways, coming up with solutions to problems when working with clients; creating a personal training business plan — in outcomes 2, 3, 5 and 6
- ◆ sense-making: analysing client information; analysing clients' programme data; making sense of constant changes when working with clients in outcomes; evaluating sessions; assessing own meta-skills development — in outcomes 1, 2, 3, 4, 5 and 7
- ◆ critical thinking: problem solving; evaluating sessions; researching information; responding to problems and changing environments; assessing risks; developing a business plan — in outcomes 2, 3, 4, 5, 6, 7 and 8

## **Delivery of unit**

The notional design length is 120 hours, however, the amount of time you allocate to each outcome is at your centre's discretion. We recommend that you integrate delivery of the unit with Training Principles for Personal Trainers (SCQF level 8).

Learners can collect evidence from the following mandatory units when generating their portfolios of work:

- ◆ Training Principles for Personal Trainers (SCQF level 8)
- ◆ PDA in Management of Long-Term Health Conditions for Exercise Practitioners (SCQF level 8)

There is also an opportunity for outcome 5 to be cross-assessed with Applied Nutrition for Sport, Physical Activity and Health at SCQF level 8.

## **Professional recognition**

You should teach this unit in conjunction with Training Principles for Personal Trainers (2-credit unit) as part of the PDA in Personal Training (SCQF level 8). Learners who complete both units are eligible to become a member of the Chartered Institute of Management of Sport and Physical Activity (CIMSPA) as a Personal Trainer Practitioner.

## Additional guidance

The guidance in this section is not mandatory.

The unit provides learners with knowledge and practical skills to deliver personal training sessions to groups or individuals. You should emphasise the importance of theoretical knowledge and applied practical skills when learners deliver sessions and evaluate their own practice. Learners also research evidence-based behaviour change theories and factors that affect health and wellbeing.

The unit covers the principles of nutrition, nutritional strategies and nutritional assessment tools that can be used with clients. Learners create a business plan that includes marketing, finance and ethical issues. Learners also develop their own meta-skills in a vocational context and develop sustainability knowledge and understanding, and skills in a vocational context in relation to [United Nations Sustainable Development Goals](#) (UN SDGs).

Your centre must have access to:

- ◆ a range of cardiovascular machines
- ◆ a range of fixed and/or free weights
- ◆ cable machines
- ◆ a suitable space to deliver the personal training sessions, such as a gym, fitness studio, hall or outdoor space
- ◆ small gym equipment such as mats, medicine balls and skipping ropes

We recommend that you integrate delivery of the unit with Training Principles for Personal Trainers (SCQF level 8). Training Principles for Personal Trainers (SCQF level 8) includes gathering client information, such as:

- ◆ client screening Physical Activity Readiness Questionnaire (PAR-Q)s
- ◆ a client seven-day nutrition diary
- ◆ health and performance testing
- ◆ planning a 12-week programme
- ◆ creating an exercise library
- ◆ biomechanics of human movement
- ◆ effects of exercise on the body systems

You can use this information as a basis for outcomes 3, 4 and 5, where learners deliver and evaluate the planned programme and analyse the client information collected from the PAR-Q, health and performance testing and seven-day nutrition diary. The learner evidence from both units should form part of a portfolio or e-portfolio.



Learners must choose a client group from the list below to complete outcomes 3, 4 and 5:

- ◆ sedentary
- ◆ recovering from an injury
- ◆ over-trained
- ◆ high-level performer
- ◆ sport-specific performer
- ◆ clients with low-risk health conditions

The unit is divided into eight outcomes with various forms of evidence gathering:

- ◆ experiential participation
- ◆ research
- ◆ creation of a business plan
- ◆ practical instruction
- ◆ delivery of personal training programmes
- ◆ evaluations of sessions delivered

Practical delivery requires you to record evidence by using an observation checklist. Learners record their evidence-based research, evaluations, nutritional analysis, business plans, meta-skills and sustainability evidence in a project. See further guidance on assessment in the 'Approaches to assessment' section:

## **Approaches to assessment**

Experiencing a range of assessment methods helps learners to develop different skills that should be transferable to work or further and higher education. The standard of evidence should be consistent with SCQF level 8.

### **Outcome 1**

Learners critically analyse the key components of a healthy lifestyle and factors that affect health and wellbeing. We recommend that learners' evidence is a written report that covers all evidence requirements. We also recommend that, when learners educate clients, they use the format of a leaflet or infographic.

This is only guidance, and learners can generate evidence in a variety of ways, such as in the form of a stand-alone assignment, oral questioning, or as part of an overall unit project.

Learners can include evidence in their portfolios.

## **Outcome 2**

Learners compare a range of evidence-based theories and approaches that can motivate positive behaviour change. We recommend that evidence is a written report that covers all evidence requirements.

This is only guidance, and learners can generate evidence in a variety of ways, such as in the form of a stand-alone assignment, oral questioning, or as part of an overall unit project.

Learners can include evidence in their portfolios.

## **Outcome 3**

Learners must deliver a minimum of 6 weeks of their planned 12-week individual or group personal training programme from Training Principles for Personal Trainers (2-credit unit) using exercises from their exercise library.

Learners must deliver one of their sessions for a minimum of 45 minutes. You assess them using a summative observation checklist. You can assess the practical sessions through a live observation or a recorded submission.

Clients should come from one of the following groups: sedentary, recovering from injury, over-trained, high-level performer, sport specific performer, clients with low-risk health conditions. Sessions should include a warm-up and cooldown, cardiovascular exercises, resistance exercises, functional exercises that mirror the client's or clients' functional requirements, and flexibility exercises that link to the client and programme aims.

Learners can include evidence in their portfolios.

## **Outcome 4**

After learners have finished the individual or group personal training sessions, they must reflect on and evaluate the sessions they delivered (a minimum of six). They can generate evidence in the form of a stand-alone assignment, oral questioning or as part of an overall unit project. For the personal training programme, learners should keep a logbook that includes all sessions and evaluations.

Learners can include the evidence in their portfolios.

## **Outcome 5**

Learners must examine the principles of nutrition, nutritional strategies used with clients, and how to incorporate the use of nutrition assessment tools.

Learners must research the principles of nutrition and nutritional strategies to improve the client's current nutrition status. They should incorporate the use of nutritional assessment tools to identify their client's dietary habits (using a food diary or tracker applications) and educate and encourage the client to make good food choices according to their health and nutrition needs (within the scope of practice). Learners should examine how nutrition recommendations would differ for clients in relation to weight management and health, hypertrophy, and sports performance.

NextGen: HN published prototype unit specification for use in pilot delivery only (version 2.0)  
August 2024

Learners can include the evidence in their portfolios. There is also an opportunity for this outcome to be cross-assessed with Applied Nutrition for Sport, Physical Activity and Health (SCQF level 8).

### **Outcome 6**

Learners construct a business plan and recognise the importance of business acumen, marketing, finance and ethical practices. We recommend learners generate evidence through a stand-alone assignment, oral presentation, or as part of an overall unit project.

Learners can include the evidence in their portfolios.

### **Outcome 7**

Learners must develop their own meta-skills in a vocational context. Learners can generate evidence through a stand-alone assignment, oral questioning, or as part of an overall unit project. We recommend that learners collect evidence for outcomes 7 and 8 holistically through a project.

It is the depth of reflection that is important, not the number of meta-skills that learners reference. For more information, you should refer to the Educator Guide.

Learners can include the evidence in their portfolios.

### **Outcome 8**

Learners must develop sustainability knowledge and understanding, and skills in a vocational context.

We recommend that learners collect evidence for outcomes 7 and 8 holistically through a project.

All written work should contain a declaration of validity that the content is the learner's own work unless cited otherwise. Submissions should be signed and dated by the learner. We encourage digital submissions through centres' virtual learning environment (VLE), using anti-plagiarism software.

## **Equality and inclusion**

This unit is designed to be as fair and as accessible as possible with no unnecessary barriers to learning or assessment.

You should take into account the needs of individual learners when planning learning experiences, selecting assessment methods or considering alternative evidence.

Guidance on assessment arrangements for disabled learners and/or those with additional support needs is available on the assessment arrangements web page:

[www.sqa.org.uk/assessmentarrangements](http://www.sqa.org.uk/assessmentarrangements).

## Information for learners

### Exercise Practitioner 2 (SCQF level 8)

This information explains:

- ◆ what the unit is about
- ◆ what you should know or be able to do before you start
- ◆ what you need to do during the unit
- ◆ opportunities for further learning and employment

### Unit information

This unit is part of the HND Physical Activity and Health group award. The unit is aimed at those who have completed HNC Physical Activity and Health, and to those wishing to pursue employment in personal training.

The unit enables you to recognise the key components of a healthy lifestyle and factors that affect the health and wellbeing of clients. You learn about evidence-based behaviour change theories and how these can be applied to help motivate clients. You deliver and evaluate a personal training programme with a client or clients. The client or clients come one from the following categories: sedentary, recovering from injury, over-trained, high-level performer, sport specific performer, clients with low-risk health conditions.

The training sessions include:

- ◆ warm up and cooldown
- ◆ cardiovascular exercises
- ◆ resistance training exercises
- ◆ functional exercises
- ◆ flexibility exercises

While teaching the personal training sessions, you observe the client, and adapt the session and provide feedback to the client based on their technique. You must interact with a client or clients and relevant professionals and use effective communication techniques.

You create a personal training business plan that includes finance, marketing and managing data. You look at different digital technology, including social media and wearable devices, such as activity trackers you could use with clients. You can use nutritional assessment tools, research the principles of nutrition and current evidence-based guidelines to improve client nutritional status. You develop sustainability knowledge and understanding and learn about meta-skills and how to develop your own meta-skills in a vocational context. A large amount of self-study and technique practice is essential to successfully completing the unit.

You should generate evidence for the unit in the form of an overall unit project. You must gather evidence in a portfolio that includes research, a logbook of personal training sessions and evaluations, and a business plan. You gather evidence of meta-skills and sustainability and present this evidence in your portfolio. You are assessed using a summative observation

NextGen: HN published prototype unit specification for use in pilot delivery only (version 2.0)  
August 2024

checklist while you deliver one of your personal training sessions for a minimum of 45 minutes. The practical sessions can be assessed through a live observation or a recorded submission.

The unit is taught in conjunction with Training Principles for Personal Trainers (2-credit unit) as part of the PDA in Personal Training (SCQF level 8). Learners who complete both units gain a PDA in Personal Training and are eligible to join the Chartered Institute for the Management of Sport and Physical Activity (CIMSPA) as a qualified Personal Trainer Practitioner.

After you finish the unit, you can progress to employment in the industry, gain entry to additional CPD or industry-relevant qualifications or move on to degree-level study.

# Administrative information

---

**Published:** August 2024 (version 2.0)

**Superclass:** GC

---

## History of changes

Version	Description of change	Date
2.0	<ul style="list-style-type: none"><li>◆ Updated Entry requirements for learners undertaking the unit as a stand-alone PDA.</li><li>◆ Reduction in Evidence requirements for outcome 6.</li></ul>	June 2024

Note: please check [SQA's website](#) to ensure you are using the most up-to-date version of this document.