Levels 3 and 4 Award in Preparing to Teach in the Lifelong Learning Sector (PTLLS)

PROGRAMME HANDBOOK

Version 3
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1 Introduction

1.1 Purpose of the handbook

This programme handbook is written for centre staff involved in the delivery of CIPD’s Level 3/4 Award in Preparing to Teach in the Lifelong Learning Sector (PTLLS).

The handbook explains the administrative, assessment and quality assurance processes that centres are required to implement to ensure the consistency and quality of CIPD PTLLS programmes. Centres will also need to meet CIPD’s generic quality assurance requirements, which can be found in our Centre Handbook for Certificate Qualifications, available on the CIPD website www.cipd.co.uk

1.2 Introduction to PTLLS

The Award in Preparing to Teach in the Lifelong Learning Sector is a single unit qualification, available at levels 3 and 4 of the new Qualifications and Credit Framework. It is aimed at individuals who:

- Want a short introduction to the skills, knowledge and understanding required to teach and train adults
- Want to gain a recognised qualification that enables them to teach or train in the Lifelong Learning sector, and progress to qualifications that lead to Associate or Qualified Teacher (Learning and Skills) status

N.B. from September 2007, all new tutors and trainers teaching on publicly funded provision will be required to gain ‘threshold status to teach’ by achieving PTLLS. New entrants will then be required to progress and achieve a qualification leading to either Associate or Qualified Teacher (Learning and Skills) status within 5 years of achieving PTLLS. Further information on the Associate level role and Qualified Teacher status for the Lifelong Learning sector can be found on LLUK’s website. http://www.lifelonglearninguk.org/.

Candidates who achieve a PTLLS award will:

- Have an understanding of the responsibilities and boundaries of their own role in relation to teaching/training
- Be able to identify and use appropriate teaching and learning approaches for the subject they intend to teach/deliver
- Be able to demonstrate session planning skills
- Understand how to deliver inclusive sessions which motivate learners
- Understand the use of different assessment methods and the need for record keeping
- Be able to reflect on their own practice and learning, and identify areas for further development

Successful candidates can progress to CIPD’s level 3 Certificate in Training Practice (CTP), which builds on PTLLS and focuses on planning, delivering and evaluating learning and development sessions within a business context.
Candidates can also progress to the level 3/4 Certificate in Teaching in the Lifelong Learning Sector (CTLLS) awarded by CIPD, and the level 5 Diploma in Teaching in the Lifelong Learning Sector (DTLLS), offered by other awarding bodies. These qualifications are recognised by LLUK as meeting the requirements for Associate Teacher and Qualified Teacher (Learning and Skills) roles respectively. As PTLLS is included as a unit within both CTLLS and DTLLS (Level 4 PTTLS only), candidates will be able to transfer credit and receive exemptions when undertaking either PTTLS or DTLLS.
2 Guidance for centres delivering PTLLS

2.1 Structure of the award

PTLLS is available at levels 3 and 4. Each level of the Award comprises a single unit with the same title, credit value and learning outcomes. The difference between Level 3 PTLLS and Level 4 PTLLS is reflected in differing assessment criteria, with the assessment criteria for level 4 PTLLS placing greater academic demands on candidates. For example, for level 3 PTLLS, the assessment criteria require candidates to:

“1.2 Identify key aspects of relevant current legislative requirements and codes of practice within a specific context”;
“4.1 Explain ways to establish ground rules with learners which underpin appropriate behaviour and respect for others”

At level 4, the corresponding assessment criteria require candidates to:

“1.2 Summarise key aspects of relevant current legislative requirements and codes of practice within a specific context” and
“4.1 Analyse different ways to establish ground rules with learners which underpin appropriate behaviour and respect for others”

Subject to CIPD approval, centres can deliver PTLLS at either level 3 or level 4 only, or deliver both levels in a combined programme, according to the needs of their candidates. In practice, there will be very little difference in the ‘taught’ content of the level 3 and level 4, although the assessment activities will need to enable each candidate to meet the assessment criteria for their particular level of qualification.

2.2 Mode and Duration of Delivery

PTLLS can be delivered on either a part-time or full-time block (fast track) basis. Both the Level 3 and the Level 4 PTLLS awards have a credit value of 6. One credit equates to 10 notional hours of study (including contact and non-contact time), giving a total notional study time of 60 hours.

CIPD requires centres to provide a minimum 30 guided learning hours (contact time) within the 60 required learning hours. Guided learning includes direct teaching, supported individual study, tutorial time, remote support, direct learner monitoring, review and assessment.

The remaining 30 hours will comprise the candidate’s own self directed learning.

There is no set programme duration, i.e. the period of time over which the required 60 learning hours are spread. However CIPD would not normally expect PTLLS programmes to extend beyond one year and, in the majority of cases, to be of a substantially shorter duration than this.

Centres can seek approval to deliver more than one PTLLS programme per year, and this should be documented within their programme approval application documents.
2.3 Programme Design

In designing a PTLLS programme, centres must ensure that

- Sufficient, appropriate learning input and support is provided to enable candidates to achieve all the PTLLS learning outcomes
- Sufficient, appropriate assessment opportunity is available to allow candidates to demonstrate their skills, knowledge and competence in relation to all the PTLLS assessment criteria.

Whilst PTLLS covers generic teaching/training skills there is equal emphasis on understanding role requirements and the particular requirements of candidates' specialist area(s).

When delivering PTLLS, centres should take account of the level and credit value of the PTLLS Award to avoid over delivery and assessment.

2.4 Delivery of PTLLS within CTLLS or CTP

PTLLS can be delivered within other CIPD programmes, primarily the Certificate in Training Practice (CTP) and/or the Certificate in Teaching in the Lifelong Learning sector (CTLLS).

Where PTLLS is delivered as a unit of CTLLS, LLUK requires PTLLS to be delivered at the beginning of the programme.

Where PTLLS is delivered in combination with the CTP, the point at which a candidate completes PTLLS, and therefore gains the threshold to practice, must be explicitly identified.

2.5 Centre and Programme Approval

In order to offer PTLLS, centres must gain formal approval from CIPD. The full procedure for gaining this approval is detailed in the CIPD Centre Handbook for Certificate Qualifications (available separately on CIPD's website).

Once approved, centres can seek further approval to offer different CIPD programmes, and usual procedures for this are also detailed in the Centre Handbook for Certificate Qualifications.

During the initial implementation phase of PTLLS, i.e. from September 2007, special, fast-track, programme approval arrangements have been established for existing centres that are currently approved to offer CTP. Centres wishing to submit an application to deliver PTLLS should contact the PTLLS QA Officer (see contact details at the back of this handbook).

2.6 Requirements for PTLLS Teaching and Assessment Team

The CIPD Centre Handbook details the general centre approval requirements regarding the programme team, including a requirement for a significant proportion of the teaching/assessment team to have met the requirements for, and gained, CIPD membership. Overall grades of membership must be appropriate to the level and range of CIPD programmes being delivered.

Centre staff who are involved in the delivery and/or assessment of PTLLS are also required to meet the following conditions agreed by LLUK:
• hold or be working towards a level 4 teaching/training qualification - for example a PGCE, PG Cert in Learning and Development, NVQ in Learning and Development, City and Guilds 7407 Certificate in Further Education Teaching (minimum stage 2).
• have recent experience in delivering and assessing teaching/training qualifications

Where either of these conditions are not yet met, tutors/assessors must have their assessment decisions sampled by an experienced member of the team until they have achieved the required qualifications and appropriate experience.

Team members whose teaching or assessing of PTLLS involves working with young people or vulnerable adults must be checked and approved by the Criminal Records Bureau.

2.7 Recruitment and Selection of Learners to PTLLS

Prior to joining any CIPD programme, learners must be provided with full information about the programme, and their suitability assessed by an approved member of the programme team.

Whilst CIPD does not set specific entry requirements for PTLLS programmes, it does require that all candidates have, with appropriate support:

• the ability to benefit from, and contribute to, their learning programme
• access to the required opportunities to complete their programme.

Centres should take account of the following factors when considering an individual’s suitability for a PTLLS programme:

• level of general education
• work experience (paid or unpaid)
• knowledge and skills of specialist subject or training context. It is expected that someone enrolling on PTLLS will normally possess at least a minimum level 3 qualification in his/her area of specialism
• level of literacy, language, numeracy and ICT skills
• period of time since education or academic studies

In making these judgements, centres must take into account and comply with all relevant CIPD policy documents, including Equal Opportunities and Reasonable Adjustments policies. Centres should also be aware that:

• the PTLLS Award can be undertaken as either a pre- or in-service award, and there is no requirement for candidates to be currently working in a training role - training practice requirements can be met through micro-teaching.
• the PTLLS Award is accredited for learners aged 19 years and over.

2.8 Registration and Membership

Centres are required to register all candidates, individually, with CIPD at the beginning of their programme, using the PTLLS Candidate Registration Form.
PTLLS candidates are encouraged to join the CIPD as student members at the beginning of their programme. Membership forms will be provided to centres for this purpose. Further information about student membership is available from cipdmembership@cipd.co.uk

Ensuring that all candidates' access student membership enables CIPD to provide the wider support afforded to learners on all CIPD programmes. Full details of CIPD membership and the benefits provided are contained in the Centre Handbook.

2.9 Initial Assessment

PTLLS candidates must have an initial assessment at the beginning of their programme. As a minimum, CIPD requires a one-to-one discussion (or series of) between the candidate and member of the programme team, at which the following is agreed and documented:

- overall approach to completing the PTLLS programme
- any physical/resource/particular needs in relation to accessing the programme and how these will be met
- any study skills support needs and how these will be met
- individual support needs in relation to literacy, numeracy and ICT skills and how this support will be provided
- individual support needs in relation to specialist area or context in which the candidate will be/intends to work, and the opportunities and support available for this (see section 2.11 for more information)
- best ways of working together to successfully complete PTLLS.

Centres are required to record outcomes of initial assessments within their own (data protection compliant) documentation systems. Candidate’s individual learning plans and reflective learning records will reflect the agreements made during initial assessment.

Centres are requested to provide information about their initial assessment processes within their programme approval application documents.

2.10 Individual Learning Plans and Records

All CIPD PTLLS candidates are required to have individual learning plans relating to their programme, and to keep a reflective record of their learning.

The use of learning plans and records provides candidates with the opportunity to develop and demonstrate the skills of planning, evaluating and managing their own development. Centres should provide guidance on the learning plan and record, and ensure that these are maintained by candidates.

CIPD does not prescribe a particular format for these documents, but provides in-depth guidance for centres and candidates on the website. www.cipd.co.uk/cpd

2.11 Support for Specialist Area

Learning outcome 2 of PTLLS requires candidates to…‘understand appropriate teaching and learning approaches in the specialist area’
Centres are required to support this learning outcome by providing one or more of the following mechanisms:

- specialist tutor support
- advice and referral to: specialist information, core texts, sector related reference and learning materials
- referral to special interest forums, such as those within the CIPD network. www.cipd.co.uk/forums (access for members only)
- negotiation of specialist internal support or mentoring from within the candidate’s employing organisation or intended sector

CIPD particularly encourages the establishment of a mentoring relationship for PTLLS candidates, where the mentor has particular knowledge and experience of the candidate’s specialist subject area or work context. Alongside the candidate’s own network, the CIPD Branch Network may be a further source of mentor support. www.cipd.co.uk/branches

Centres should establish appropriate arrangements for supporting candidates in their specialist area, and detail these within their programme approval application documents.

2.12 Indicative Content

The indicative content is set out on page 13.

2.13 Assessment Strategy

In order to achieve PTLLS award candidates must:

- meet all the PTLLS assessment criteria
- complete a reflective learning record.

Candidates will normally meet the PTLLS assessment criteria through a combination of the following:

- 1 x assignment with related appendices / supporting evidence
- 1 x observation of training, (minimum 30 minutes), in either a microteaching or real work context
- recorded question and answer to ensure complete coverage of all assessment criteria at the required level.

PTLLS is not graded. Candidates either meet (pass) or do not meet (fail) the requirements of PTLLS. The depth of knowledge and skill reflected in the candidate's work is recognised by the level of their Award.

Assessment must be undertaken by approved programme staff. Where the centre does not have the required subject expertise, some witness testimony will be required from subject specialists to confirm the appropriateness of selected teaching strategies to candidates’ subject area or work context. Where this is the case, centres are responsible for briefing and supporting any non-programme staff in this process.

2.14 The Assignment

PTLLS candidates are required to complete an assignment.
In order to meet the assessment criteria, CIPD recommends that the assignment includes:

- an explanation of the candidate’s role and the context within which they work (or seek to work)
- a rationale for how they would train others in some aspect of their specialist area(s), and a related session plan
- an explanation of how
  - the session structure, methods, content and resources are appropriate to the subject area
  - opportunities to include appropriate elements of functional skills have been utilised
  - the session meets the needs of the intended learners
- an explanation of the actual or potential use of candidate assessment to inform or support the training session – reference should be made to initial, formative and summative assessment, appropriate assessment methods and related record keeping requirements.

Centres should develop their own PTLLS assignment (a pro-forma is provided at section 4.2), ensuring that it will allow candidates to address all the relevant criteria.

In developing the assignment, centres should consider the following:

- assignments must reflect the level of programme to which they relate and allow candidates to address the required assessment criteria
- assignment briefs should indicate the related learning outcomes and the assessment criteria they are intended to address
- assignment briefs should provide clear instruction regarding the task(s) to be undertaken
- assignments should require realistic work activities
- resources required for assignments should be realistic and available
- assignments should have a word count of around 2,000 - 2,500 words (plus appendices).

Centres must submit assignment briefs to CIPD as part of the programme approval process, and provide an explanation of how the assignments meet the assessment requirements.

### 2.15 Observation of Teaching/Training Practice

The PTLLS Award requires all candidates to deliver a (minimum) 30 minute training/teaching session.

This can be delivered in either a micro-teaching or real work situation and must be observed and assessed by a member of the PTLLS programme team.

A Candidate Observation Record is provided for this purpose at section 4.1.
Candidates may also spend time observing their peers delivering training sessions, in a micro-teaching context, provided the assessed micro-teaching time and time spent observing others does not exceed more than 6 hours per candidate.

2.16 Recorded Question and Answer

In order for candidates to meet all the PTLLS assessment criteria, it may be necessary to complete any ‘gaps’ around the assignment and observation with question and answer.

Questions and answers, whether verbal or written, should be recorded and the records held by the candidate within their collection of work for PTLLS.

2.17 Assessment Records

It is anticipated that centres will use their own learning review / formative assessment systems for recording progress towards achievement of PTLLS.

Centres, in conjunction with candidates, must provide a clear summative assessment record, explicitly detailing how the PTLLS assessment criteria have been met. A Summative Assessment Record pro-forma is provided at section 4.3.

It is recommended that candidates keep their PTLLS assignments, observation record, recorded question and answer and any supporting evidence in a binder or folder, fronted by a completed Summative Assessment Record.

Copies of assessment records must be held by the centre and made available for internal verification and CIPD moderation purposes, as required.

2.18 Internal Verification

Centres are required to establish internal processes for quality assuring assessment, and must detail these in their programme approval submission documents. Typical processes would include sampling of assessment decisions, joint observation of training practice, and checking of summary assessment records.

Every candidate on the PTLLS programme must have some aspect of their work internally verified, prior to final external moderation.

2.19 External Verification

We will appoint an External Verifier (EV) to be responsible for your centre and to report directly to us about the assessment of the PTLLS qualification(s) at your centre. Each EV is part of a regional team led by a Regional Verifier (RV). EVs are usually allocated to a centre for a two-three year period to maintain the rigour of our quality assurance process.

The purpose of Verification

The purpose of Verification is to ensure that:

- the learning outcomes/assessment criteria have been interpreted and applied with integrity
there is consistency in standards across assessments and assessors

The Visit

Centres will have one external visit at the end of the first PTLLS cohort and then a maximum of two visits per year.

The key elements of the visit will include:

- Sampling of assignments
- Checking of all candidate portfolios evidence sheets
- Meetings with members of the assessment team
- A review of action points agreed at the previous visit

1. Prior to the visit, the EV will request a copy of the Student Progress Form (SPF), showing the assessment outcomes for each candidate. The centre should not send any assignments at this stage.

2. At the visit, using the SPF, 20% of candidates’ assessed work will be selected for sampling by the EV (minimum of 6 – maximum of 15).

   This sample should be across the whole range of assessments and will include all assessors.

3. Where there are concerns regarding the standard of assessment, the EV will ask for a further 5% of assessed work.
### Learning Outcomes

<table>
<thead>
<tr>
<th>Learning Outcomes</th>
<th>Assessment Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>The learner will:</strong></td>
<td><strong>The learner can:</strong></td>
</tr>
<tr>
<td>1. Understand own role, responsibilities and boundaries of role in relation to teaching.</td>
<td>1.1 Explain own role and responsibilities, and boundaries of own role as a teacher. (*)</td>
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<tr>
<td></td>
<td>1.2 Identify key aspects of relevant current legislative requirements and codes of practice within a specific context.</td>
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<td></td>
<td>1.3 Identify other points of referral available to meet the potential needs of learners.</td>
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<tr>
<td></td>
<td>1.4 Identify issues of equality and diversity, and ways to promote inclusion.</td>
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<tr>
<td></td>
<td>1.5 Explain the need for record keeping.</td>
</tr>
<tr>
<td>2. Understand appropriate teaching and learning approaches in the specialist area.</td>
<td>2.1 Identify and demonstrate relevant approaches to teaching and learning in relation to the specialist area.</td>
</tr>
<tr>
<td></td>
<td>2.2 Explain ways to embed elements of functional skills in the specialist area.</td>
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<td></td>
<td>2.3 Justify selection of teaching and learning approaches for a specific session.</td>
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<tr>
<td>3. Demonstrate session planning skills.</td>
<td>3.1 Plan a teaching and learning session which meets the needs of individual learners.</td>
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<td></td>
<td>3.2 Justify selection of resources for a specific session.</td>
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<tr>
<td>4. Understand how to deliver inclusive sessions which motivate learners.</td>
<td>4.1 Explain ways to establish ground rules with learners which underpin appropriate behavior and respect for others.</td>
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<tr>
<td></td>
<td>4.2 Use a range of appropriate and effective teaching and learning approaches to engage and motivate learners.</td>
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<td></td>
<td>4.3 Explain and demonstrate good practice in giving feedback.</td>
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<td></td>
<td>4.4 Communicate appropriately and effectively with learners.</td>
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<td></td>
<td>4.5 Reflect on and evaluate the effectiveness of own teaching.</td>
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<tr>
<td>5. Understand the use of different assessment methods and the need for record keeping.</td>
<td>5.1 Identify different assessment methods.</td>
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<tr>
<td></td>
<td>5.2 Explain the use of assessment methods in different contexts, including reference to initial assessment.</td>
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<tr>
<td></td>
<td>5.3 Explain the need for record keeping in relation to assessment.</td>
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</tbody>
</table>
### 3.2 Level Four: Preparing to Teach in the Lifelong Learning Sector

**UNIT TITLE:** Preparing to Teach in the Lifelong Learning Sector  
**LEVEL:** Four  
**CREDIT VALUE:** 6  
**UNIT CODE:**

This unit has 5 learning outcomes.

<table>
<thead>
<tr>
<th>Learning Outcomes</th>
<th>Assessment Criteria</th>
</tr>
</thead>
</table>
| **1. Understand own role, responsibilities and boundaries of role in relation to teaching.** | 1.1 Review own role and responsibilities, and boundaries of own role as a teacher. (*)  
1.2 Summarise key aspects of relevant current legislative requirements and codes of practice within a specific context.  
1.3 Review other points of referral available to meet the potential needs of learners.  
1.4 Discuss issues of equality and diversity, and ways to promote inclusion.  
1.5 Justify the need for record keeping. |
| **2. Understand appropriate teaching and learning approaches in the specialist area.** | 2.1 Identify, adapt and use relevant approaches to teaching and learning in relation to the specialist area.  
2.2 Evaluate a range of ways to embed elements of functional skills in the specialist area.  
2.3 Evaluate the teaching and learning approaches for a specific session. |
| **3. Demonstrate session planning skills.** | 3.1 Plan a teaching and learning session which meets the needs of individual learners.  
3.2 Evaluate how the planned session meets the needs of individual learners.  
3.3 Analyse the effectiveness of the resources for a specific session. |
| **4. Understand how to deliver inclusive sessions which motivate learners.** | 4.1 Analyse different ways to establish ground rules with learners which underpin appropriate behavior and respect for others.  
4.2 Use a range of appropriate and effective teaching and learning approaches to engage and motivate learners.  
4.3 Explain different methods of giving feedback.  
4.4 Demonstrate good practice in giving feedback.  
4.5 Communicate appropriately and effectively with learners.  
4.6 Reflect on and evaluate the effectiveness of own teaching, making recommendations for modification as appropriate. |
| **5. Understand the use of different assessment methods and the need for record keeping.** | 5.1 Review a range of different assessment methods.  
5.2 Evaluate the use of assessment methods in different contexts, including reference to initial assessment.  
5.3 Justify the need for record keeping in relation to assessment. |
4 Indicative Content

1. UNDERSTAND OWN ROLE, RESPONSIBILITIES AND BOUNDARIES OF ROLE IN RELATION TO TEACHING.

1.1 Explain own role and responsibilities, and boundaries of own role as a teacher.

- **Responsibilities and functions of the tutor/trainer**: for example, preparing, planning, design and execution of delivery, record keeping, tutorials, preparing and assessing work, giving and receiving constructive feedback.
- **Responsibilities to Learner**: learner rights, equality, diversity, inclusion, principles of effective communication and barriers.
- **Reflective Practitioner**
- **The Role of the teacher/trainer** and the contexts in which they operate, for example Workplace Training, Work based learning, Further Education, Adult & Community Learning)
- **Limitations** of own role and some knowledge of referral to specialist internal and external agencies, for example Connexions, centre counselling services
- **Boundaries** of teacher/trainer roles and other sources of support (learning and personal) for learners. Defining the extent of the teacher role, for example when and how to contact students, maintaining professional relationships and own organisation protocol

1.2 Identify key aspects of relevant current legislative requirements and codes of practice within a specific context.

- **Relevant legislation** relating to specialist areas
- **Codes of practice**, for example CIPD Code of Professional Conduct and Disciplinary procedures; IFL Code of Professional Practice;

1.3 Identify other points of referral available to meet the potential needs of learners.

- **Referral of candidates** for additional or specialist support, either within the Centre or to External Agencies, for example, Basic skills support, Dyslexia support, ESOL.

1.4 Identify issues of equality and diversity, and ways to promote inclusion.

- **Principles** of equality and diversity, for example, access, non-discriminatory language and Inclusion
- **Consider own role** in promoting equal opportunities and diversity through teaching materials
- **Consideration of the impact** of legislation and own language on delivery
- **Range** of teaching styles to adapt to needs of different learners
1.5 Explain the need for record keeping

- Attendance, retention and learner progression records
- Records of personal objective setting for candidates
- Maintaining up to date tutorial records
- Learners’ skills audits, learning styles and records of initial interview

2. UNDERSTAND APPROPRIATE TEACHING AND LEARNING APPROACHES IN THE SPECIALIST AREA

2.1 Identify and demonstrate relevant approaches to teaching and learning in relation to the specialist area.

- Range of approaches to teaching and learning, their advantages and disadvantages (e.g. presentation, facilitation of group activities, 1:1 coaching, on-line or distance learning)
- Subject specific requirements re knowledge, skills & qualifications
- Consideration of appropriate resources and equipment relevant to specialist area
- Suitable venue/environment, room layout

2.2 Explain ways to embed elements of functional skills in the specialist area.

- Understanding of Functional Skills (Numeracy, Language, Literacy and ICT,)
- Examples of how to embed functional skills into learning plans for specialist area(s).

2.3 Justify selection of teaching and learning approaches for a specific session.

- Learning styles e.g. Visual, auditory and kinaesthetic; Individual learning styles, for example, Honey and Mumford’s questionnaire
- Teaching strategies, for example, Lecture, Discussions, Seminar, Role play, simulation and games, discussion, tutorials, practical work
- Factors that affect teaching and learning approaches, for example, legislative, subject related, organisational, individual/personal
- Inclusiveness, equal opportunities, diversity

3. DEMONSTRATE SESSION PLANNING SKILLS.

3.1 Plan a teaching and learning session which meets the needs of individual learners.

- Training Cycle
- Clarify learning needs, for example through the Training Cycle, job role requirements, curriculum requirements, initial assessment
- Planning, to structure a teaching/training session, for example lesson aims, objectives, logic, sequencing, timing, summaries
- Scheme of Work, Structure
- Lesson/training plan, Structure
- Range of techniques to address individual needs, group work, audio visual, Q&A, individual support
3.2 Justify selection of resources for a specific session.

- **Factors affecting design**, for example, numbers, location, resources, facilities and equipment, health and safety, equality of opportunity, diversity, resources and constraints, cost/benefit

4. UNDERSTAND HOW TO DELIVER INCLUSIVE SESSIONS WHICH MOTIVATE LEARNERS

4.1 Explain ways to establish ground rules with learners which underpin appropriate behaviour and respect for others.

- Creating a climate conducive to learning, for example, establish rapport, interaction with learners, putting learners at ease
- Ground rules, use and purpose
- Induction, use and purpose
- Issues of equality of opportunity and non-discriminatory practice in training delivery - possible sources of bias, promoting equality
- Personal delivery techniques, for example, voice, mannerisms, language, pace, non-verbal communication
- Room layout and the physical environment, including health and safety issues

4.2 Use a range of appropriate and effective teaching and learning approaches to engage and motivate learners.

- Range of activities, delivery methods and teaching strategies, for example, visual, auditory and kinaesthetic,
- Motivation theory - intrinsic, extrinsic factors
- Information Communication Technology

4.3 Explain and demonstrate good practice in giving feedback.

- Principles of giving feedback to learners - constructive, developmental
- Methods of giving feedback, for example, written, spoken, tutorials

4.4 Communicate appropriately and effectively with learners.

- Effective communication, listening skills, body language, communication theory

4.5 Reflect on and evaluate the effectiveness of own teaching.

- Reflective practice
- Quality assurance systems within own organisation including, for example, internal inspection to develop and inform practice
- Continuing professional development
5. UNDERSTAND THE USE OF DIFFERENT ASSESSMENT METHODS AND THE NEED FOR RECORD KEEPING

5.1 Identify different assessment methods.

- *Different types of assessment*, for example competence, knowledge, skills, other
- *Assessment methods*, for example, tests, interviews, observation, work-based evidence, assignments, examination, Question and Answer
- *Stages of assessment*, initial, formative and summative

5.2 Explain the use of assessment methods in different contexts, including reference to initial assessment.

- *Reasons for assessment*, for example, initial, diagnostic, summative and formative assessment
- *Issues of equality, validity and reliability*

5.3 Explain the need for record keeping in relation to assessment.

- *Maintaining records* of student results and recording feedback in accordance with awarding body, own organisation requirements
- *Methods of recording* and storing assessment information
## 5 Assessment Documents

### 5.1 Candidate Observation Record

<table>
<thead>
<tr>
<th>No.</th>
<th>Criteria</th>
<th>Met?</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>has a clear and appropriate session plan</td>
<td></td>
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<tr>
<td>2</td>
<td>has all required training materials and equipment and has sufficient learning materials for all participants</td>
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<tr>
<td>3</td>
<td>prepares the learning environment in a way that assists learner participation and inclusion</td>
<td></td>
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<tr>
<td>4</td>
<td>considers and addresses health &amp; safety factors in the learning environment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>clarifies and agrees the purpose and objectives of the training session, with learners</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>uses a range of training approaches that are appropriate to the learners and to the subject area</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Description</td>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>-------------------------------------------------------------------------------------------------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>uses learning resources appropriately and effectively</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>monitors and encourages learner engagement and participation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>communicates appropriately and effectively with learners and demonstrates good practice in giving feedback to candidates</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>concludes the session clearly and uses appropriate methods to assesses the effectiveness of the session</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Summary Comments**
To what extent has the candidate delivered a session which:
- a) is effective
- b) is inclusive
- c) motivates learners
5.2 PTLLS Assignment Template

Assignment No:

Assignment Title:

Links to Unit(s), Learning Outcomes, Assessment Criteria:

Overall Aim of Assignment:

* Specific Objectives / Requirements:
  *
  *
  *
  *
  *

Assignment Guidance: (As well as general guidance to candidates, please clarify any further requirements of this assignment, regarding minimum core, specialist area or observation of teaching practice.)

Approximate Word Count:

Submission Date:
### 5.3 Summative Assessment Record (Level 3)

**UNIT: Preparing to Teach in the Lifelong Learning Sector (Level 3)**

<table>
<thead>
<tr>
<th>Assessment Criteria</th>
<th>How / Where Criteria are met</th>
</tr>
</thead>
</table>
| 1. Understand own role, responsibilities and boundaries of role in relation to teaching. | 1.1 Explain own role and responsibilities, and boundaries of own role as a teacher.  
1.2 Identify key aspects of relevant current legislative requirements and codes of practice within a specific context.  
1.3 Identify other points of referral available to meet the potential needs of learners.  
1.4 Identify issues of equality and diversity, and ways to promote inclusion.  
1.5 Explain the need for record keeping. |
| 2. Understand appropriate teaching and learning approaches in the specialist area. | 2.1 Identify and demonstrate relevant approaches to teaching and learning in relation to the specialist area.  
2.2 Explain ways to embed elements of functional skills in the specialist area.  
2.3 Justify selection of teaching and learning approaches for a specific session. |
| 3. Demonstrate session planning skills. | 3.1 Plan a teaching and learning session which meets the needs of individual learners.  
3.2 Justify selection of resources for a specific session. |
4. Understand how to deliver inclusive sessions which motivate learners.

4.1 Explain ways to establish ground rules with learners which underpin appropriate behaviour and respect for others.
4.2 Use a range of appropriate and effective teaching and learning approaches to engage and motivate learners.
4.3 Explain and demonstrate good practice in giving feedback.
4.4 Communicate appropriately and effectively with learners.
4.5 Reflect on and evaluate the effectiveness of own teaching.

5. Understand the use of different assessment methods and the need for record keeping.

5.1 Identify different assessment methods.
5.2 Explain the use of assessment methods in different contexts, including reference to initial assessment.
5.3 Explain the need for record keeping in relation to assessment.

I confirm that all requirements have been met for this unit....

Signed (Candidate):

Name:

Signed (Approved Tutor):

Name:

Date:
### 5.4 Summative Assessment Record (Level 4)

**UNIT: Preparing to Teach in the Lifelong Learning Sector (Level 4)**

<table>
<thead>
<tr>
<th>Assessment Criteria</th>
<th>How / Where Criteria are met</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Understand own role, responsibilities and boundaries of role in relation to teaching</td>
<td></td>
</tr>
<tr>
<td>1.1 Review own role and responsibilities, and boundaries of own role as a teacher. (*)</td>
<td></td>
</tr>
<tr>
<td>1.2 Summarise key aspects of relevant current legislative requirements and codes of practice within a specific context. (AP 6.1)</td>
<td></td>
</tr>
<tr>
<td>1.3 Review other points of referral available to meet the potential needs of learners. (FP 1.1)</td>
<td></td>
</tr>
<tr>
<td>1.4 Discuss issues of equality and diversity, and ways to promote inclusion. (AK3.1)</td>
<td></td>
</tr>
<tr>
<td>1.5 Justify the need for record keeping.</td>
<td></td>
</tr>
<tr>
<td>2. Understand appropriate teaching and learning approaches in the specialist area.</td>
<td></td>
</tr>
<tr>
<td>2.1 Identify, adapt and use relevant approaches to teaching and learning in relation to the specialist area. (CK3.1; CP3.1)</td>
<td></td>
</tr>
<tr>
<td>2.2 Evaluate a range of ways to embed elements of functional skills in the specialist area. (CK3.3)</td>
<td></td>
</tr>
<tr>
<td>2.3 Evaluate the teaching and learning approaches for a specific session. (C 3.1)</td>
<td></td>
</tr>
<tr>
<td>3. Demonstrate session planning skills.</td>
<td></td>
</tr>
<tr>
<td>3.1 Plan a teaching and learning session which meets the needs of individual learners. (DP 1.2)</td>
<td></td>
</tr>
<tr>
<td>3.2 Evaluate how the planned session meets the needs of individual learners (DP 1.2)</td>
<td></td>
</tr>
<tr>
<td>3.3 Analyse the effectiveness of the resources for a specific session.</td>
<td></td>
</tr>
<tr>
<td>4. Understand how to deliver inclusive sessions which motivate learners.</td>
<td></td>
</tr>
<tr>
<td>4.1 Analyse different ways to establish ground rules with learners which underpin appropriate behaviour and respect for others.</td>
<td></td>
</tr>
<tr>
<td>4.2 Use a range of appropriate and effective teaching and learning approaches to engage and motivate learners.</td>
<td></td>
</tr>
<tr>
<td>4.3 Explain different methods of giving feedback</td>
<td></td>
</tr>
<tr>
<td>4.4 Demonstrate good practice in giving feedback.</td>
<td></td>
</tr>
<tr>
<td>4.5 Communicate appropriately and effectively with learners.</td>
<td></td>
</tr>
<tr>
<td>4.6 Reflect on and evaluate the effectiveness of own teaching, making recommendations for modification as appropriate</td>
<td></td>
</tr>
<tr>
<td>5. Understand the use of different assessment methods and the need for record keeping.</td>
<td></td>
</tr>
<tr>
<td>5.1 Review a range of different assessment methods.</td>
<td></td>
</tr>
<tr>
<td>5.2 Evaluate the use of assessment methods in different contexts, including reference to initial assessment.</td>
<td></td>
</tr>
<tr>
<td>5.3 Justify the need for record keeping in relation to assessment.</td>
<td></td>
</tr>
</tbody>
</table>

I confirm that all requirements have been met for this unit

Signed (Candidate):
Name:

Signed (Approved Tutor):
Name:
Date:
## 6 CIPD Student Progress Form (SPF)

CIPD Award in Preparing to Teach in the Lifelong Learning Sector (PTLLS)

### Centre

Programme Cohort Start and Finish Date

<table>
<thead>
<tr>
<th>Surname</th>
<th>Forenames</th>
<th>CIPD Membership No. (If applicable)</th>
<th>Satisfactory completion of…</th>
<th>Final Result (Pass/Fail)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Obs.</td>
<td>Assign.</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Q&amp;A (if applicable)</td>
<td>Learning Record</td>
</tr>
<tr>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

Programme Leader:  Signature  Name  Date

CIPD Moderator:  Signature

---

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## 7  External Verification of Assignment (PTLLS EVA)

<table>
<thead>
<tr>
<th>Date of Moderation:</th>
<th>Moderator:</th>
<th>Centre:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Candidate:</td>
<td>Assessor:</td>
<td>Assignment Title or Reference:</td>
</tr>
</tbody>
</table>

### Quality/Level of Candidate’s Work

*(Overall standard, structure, presentation and quality of work in relation to the level and requirements of PTLLS)*

### Integrity of Assessment

*(Compliance with PTLLS requirements, accuracy of assessment, interpretation of assessment criteria, coverage of assessment criteria)*

### Quality of Feedback

### Assessment Outcome?

| Agreed? | External Verifier Signature: |
8 Cohort Report Form Moderation (PTLLS CRFM)

<table>
<thead>
<tr>
<th>Date of Moderation:</th>
<th>Moderator:</th>
<th>Centre:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cohort Start /Finish dates:</td>
<td>Size of Cohort:</td>
<td>Cohort Assessor(s):</td>
</tr>
</tbody>
</table>

**MODERATOR COMMENTS (Please provide summary comments including areas of strength and any areas of concern.)**

<table>
<thead>
<tr>
<th>Quality/Level of Candidate Work</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>(Overall standard, structure, presentation and quality of work in relation to the level and requirements of PTLLS)</em></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Quality, and Integrity of Assessment Practice</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>(Compliance with PTLLS requirements, accuracy of assessment, interpretation of assessment criteria, coverage of assessment criteria)</em></td>
</tr>
</tbody>
</table>
9 Mapping Document

The CIPD Certificate in Training Practice (CTP) – Matrix showing possible relationship between the Certificate in Training Practice and the Level 3 Award in Preparing to Teach in the Lifelong Learning Sector

The matrix below shows the relationship between the PTLLS and the CTP. This is a useful tool if you are embedding PTLLS into the CTP or would like to offer an additional ‘top up’ to the PTLLS in order that candidates gain the CTP and Associate Membership.

Please note that PTLLS must be delivered at the start of a programme. Where PTLLS is embedded within the CTP, the point at which a candidate satisfactorily completes PTLLS, and therefore gains a threshold licence to practice, must be identified.

<table>
<thead>
<tr>
<th>Preparing to Teach in the Lifelong Learning Sector (PTLLS) – Specification</th>
<th>Certificate in Training Practice (CTP) – Specification</th>
<th>Mapping Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Learning Outcomes</strong></td>
<td><strong>Assessment Criteria</strong></td>
<td><strong>Relevant Module(s)</strong></td>
</tr>
</tbody>
</table>
| 1. Understand own role, responsibilities and boundaries of role in relation to teaching. | 1.1 Explain own role and responsibilities, and boundaries of own role as a teacher. (*) | 1 Training in Context. | P.1 Manage own personal and professional development.  
P.2 Build effective relationships with colleagues and customers.  
P.3 Plan, monitor and keep records of training sessions.  
******  
K.1 Continuing personal and professional development  
- The principles of self-evaluation and personal development planning and the strategies, support and sources needed to put it into practice.  
K.2 The organisational context  
- The contribution that training and development makes to organisational success and the factors that influence its effectiveness.  
- Organisational roles and relationships in relation to personnel and development.  
- The effect of legislation and government influence on training practice. |
| | 1.2 Identify key aspects of relevant current legislative requirements and codes of practice within a specific context. (AP 3.1) | | PTLLS-1.1 & PTLLS-1.3 could be covered by CTP-K.2 (point 1&2) |
| | 1.3 Identify other points of referral available to meet the potential needs of learners. (FP 2.1) | | PTLLS-1.2 should be covered by CTP-K.2 (point 3) |
| | 1.4 Identify issues of equality and diversity, and ways to promote inclusion. (AP 2) | | PTLLS-1.4 should be partly covered by CTP-K.2 (pt 3) |
| | 1.5 Explain the need for record keeping. | | Note: PTLLS-1.4 should also be covered by CTP Module 2, K.1 & K.2 |
| | | | PTLLS-1.5 should be covered by CTP-P.3 & K.3 |
| | | | Note: Tutor will need to ensure that CTP input fully |
### Preparing to Teach in the Lifelong Learning Sector (PTLLS) – Specification

<table>
<thead>
<tr>
<th>Learning Outcomes</th>
<th>Assessment Criteria</th>
<th>Relevant Module(s)</th>
<th>Performance &amp; Knowledge Indicators</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Understand appropriate teaching and learning approaches in the specialist area.</td>
<td>2.1 Identify and demonstrate relevant approaches to teaching and learning in relation to the specialist area. (BP 2.2)</td>
<td>P.1 Identify, prioritise and agree learning needs with individuals and groups, using appropriate methods of analysis. P.2 Recommend learning and development opportunities relevant to identified needs.</td>
<td>PTLLS-2.1(Identify) should be met by CTP-P.2</td>
</tr>
<tr>
<td></td>
<td>2.2 Explain ways to embed elements of functional skills in the specialist area. (BP 4.3)</td>
<td>K.1 Identifying learning needs - Methods and sources of information for identifying learning needs. - Factors affecting individual learning, in and out of the workplace.</td>
<td>Note: PTLLS-2.1 (demonstrate) will be met in CTP Module 4 – ‘Deliver &amp; Evaluate Training’</td>
</tr>
<tr>
<td></td>
<td>2.3 Justify selection of teaching and learning approaches for a specific session.</td>
<td>K.2 Recommending learning opportunities - The range of learning opportunities, including workplace and e-learning, their advantages and disadvantages, and principles of equality of access/opportunity.</td>
<td>PTLLS-2.2 could be met by CTP-K.2</td>
</tr>
<tr>
<td></td>
<td>3 Designing training and assessment. (P/K.1 &amp; P/K.2 only)</td>
<td>P.1 Design training and development sessions for individual learners or groups. P.2 Prepare and/or develop relevant materials and facilities to support training and development sessions.</td>
<td>PTLLS-2.3 should be met by CTP-K.1 &amp; K.2</td>
</tr>
<tr>
<td></td>
<td></td>
<td>K.1 Designing training - The principles of adult learning. - The principles of effective design, and the range of factors affecting design.</td>
<td>---------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Note: Tutor will need to ensure that CTP input fully covered.</td>
</tr>
</tbody>
</table>

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<table>
<thead>
<tr>
<th>Preparing to Teach in the Lifelong Learning Sector (PTLLS) – Specification</th>
<th>Certificate in Training Practice (CTP) – Specification</th>
<th>Mapping Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Learning Outcomes</strong></td>
<td><strong>Assessment Criteria</strong></td>
<td><strong>Relevant Module(s)</strong></td>
</tr>
<tr>
<td>3. Demonstrate session planning skills.</td>
<td>3.1 Plan a teaching and learning session which meets the needs of individual learners. (CP 1.2) 3.2 Justify selection of resources for a specific session. (CP 4.1)</td>
<td>3 Designing training and assessment.</td>
</tr>
<tr>
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<td></td>
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<td></td>
</tr>
</tbody>
</table>

PTLLS Programme Handbook V3
<p>| Learning Outcomes | Assessment Criteria                                                                 | Relevant Module(s)                                                                 | Performance &amp; Knowledge Indicators                                                                                                                                                                                                 |
|-------------------|--------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|                                                                                                                                                                                                                               |
| 4. Understand how to deliver inclusive sessions which motivate learners. | 4.1 Explain ways to establish ground rules with learners which underpin appropriate behaviour and respect for others. (DK 1.2) 4.2 Use a range of appropriate and effective teaching and learning approaches to engage and motivate learners. (DP 2.3) 4.3 Explain and demonstrate good practice in giving feedback. (EP 5.2) 4.4 Communicate appropriately and effectively with learners. (AP 8.1) 4.5 Reflect on and evaluate the effectiveness of own teaching. (DP 2.9) | 4. Delivering and evaluating training | P.1 Prepare, deliver and review a range of practical learning sessions for individuals and groups. P.2 Evaluate training and development sessions for individuals and groups, using appropriate methods, and make improvements as appropriate. ****** K.1 Delivering training sessions - The range of delivery styles and presentation techniques, including on-line learning, skills needed, advantages and disadvantages and criteria for their selection. - How to create a climate conducive to learning, and overcome barriers to learning. K. 2 Review and evaluation - The purpose, principles, scope and focus of evaluation. - Evaluation methods and procedures and criteria for their selection. - Factors to consider when recommending and making improvements. |
|                   |                                                                                      |                                    |                                                                                                                                                                                                                               |
|                   |                                                                                      |                                    | PTLLS-4.1 should be covered by CTP-K.1                                                                                                                                                                                      |
|                   |                                                                                      |                                    | PTLLS-4.2 will be covered within CTP-P.1                                                                                                                                                                                      |
|                   |                                                                                      |                                    | PTLLS-4.3 (explain) could be covered in CTP-K.1                                                                                                                                                                                      |
|                   |                                                                                      |                                    | PTLLS-4.3 (demonstrate) and PTLLS-4.4 should be covered in CTP-P.1                                                                                                                                                                                      |
|                   |                                                                                      |                                    | Note: feedback in relation to assessment is also covered in CTP Module 3, P.3                                                                                                                                                                                      |
|                   |                                                                                      |                                    | PTLLS-4.5 should be covered by CTP-P.2 and K.2                                                                                                                                                                                      |
|                   |                                                                                      |                                    | Note: PTLLS-4.5 is also addressed in CTP Module 1, P.1 &amp; K.1                                                                                                                                                                                      |
|                   |                                                                                      |                                    | Note: Tutor will need to ensure that CTP input fully covers Initial Award requirement and outcomes are met.                                                                                                                                                                                      |</p>
<table>
<thead>
<tr>
<th>Learning Outcomes</th>
<th>Assessment Criteria</th>
<th>Relevant Module(s)</th>
<th>Performance &amp; Knowledge Indicators</th>
<th>Mapping Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>5. Understand the use of different</td>
<td>5.1 Identify different assessment methods. (EP1.1)</td>
<td>3 Designing training and assessment</td>
<td>P.3 Assess and provide feedback to learners.</td>
<td>PTLLS-5.1 &amp; 5.2 should be covered by CTP-K3</td>
</tr>
<tr>
<td>assessment methods and the need for</td>
<td>5.2 Explain the use of assessment methods in different contexts, including reference</td>
<td>(P/K.3 only)</td>
<td>*****</td>
<td>PTLLS-5.3</td>
</tr>
<tr>
<td>record keeping.</td>
<td>to initial assessment. (EP 1.2)</td>
<td></td>
<td>K.3 Assessment</td>
<td>Note: reference is made to record keeping in CTP Module 1, P.3 – but should be emphasised in the context of assessment, here, to meet the PTLLS criteria.</td>
</tr>
<tr>
<td></td>
<td>5.3 Explain the need for record keeping in relation to assessment. (EP 6.3)</td>
<td></td>
<td>- Methods for assessing learning, their advantages and disadvantages</td>
<td>Note: Tutor will need to ensure that CTP input fully covers Initial Award requirement and that PTLLS outcomes are fully met.</td>
</tr>
</tbody>
</table>
### Roles and contact details of CIPD PTLLS Quality Assurance Team

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
<th>Contact</th>
</tr>
</thead>
</table>
| Debbie A John  | QA Manager, Certificates | 020 8612 6395  
d.a.john@cipd.co.uk |
| Charlotte Cope | QA Officer            | 020 8612 6492  
c.cope@cipd.co.uk       |
| Sophie Borman  | QA Coordinator        | 020 8612 6390  
s.borman@cipd.co.uk       |