

## Adult Learning NOS 2023 - combined files

NOS Ref	NOS Title
CLDAL1	Monitor, evaluate and respond to the impact of trends and developments in adult learning in the community
CLDAL2	Influence and develop adult learning strategy
CLDAL3	Build and maintain relationships with learners to ensure a learner-centred approach
CLDAL4	Build and maintain relationships with stakeholders and the wider community
CLDAL5	Engage and support learners
CLDAL6	Plan and deliver learning
CLDAL7	Develop and prepare resources
CLDAL8	Support learners to achieve their learning goals and objectives
CLDAL9	Assist learners to review their own progress and implement their development objectives.
CLDAL10	Enable learners to identify, reflect and use their learning to enhance their future personal development
**CLDL09	Assess learner achievement
**CLDFL11	Enable access to future learning and development opportunities
CLDAL11	Secure funding and resources
CLDAL12	Engage in the strategic development of adult learning
**INSML008	Promote equality of opportunity, diversity and inclusion in your organisation
CLDAL13	Advocate with and on behalf of learners so that their interests are represented
CLDAL14	Assist learners to assess risk and make informed choices in the management of their health and wellbeing
CLDAL15	Take responsibility for the safety and security of learners and environments
CLDAL16	Develop and sustain working relationships with colleagues and stakeholders
**INSML003	Develop and maintain your professional connections
CLDAL17	Develop and apply understanding of theory and effective practice in adult learning
CLDAL18	Comply with legal, regulatory and ethical requirements
CLDAL19	Manage personal development and reflect on current practice
**CLDCD17	Plan and undertake research
**CLDCD16	Monitor, evaluate and improve the effectiveness of the provision

\*\* Signpost NOS

## Overview

This standard is about making sure that your organisation has access to up to date and reliable information about current and emerging issues in Adult Learning. Investigating and identifying the needs of adults and the local community helps to determine existing provision and contributes to developing and enhancing the provision of adult learning within the community. You will investigate those needs with adults and other stakeholders, evaluating and analysing whether existing provision meets identified needs.

You will draw conclusions based on your findings and make recommendations which will prioritise needs in line with the organisations' own remit and ability to provide opportunities and activities.

It is important to keep your own knowledge up to date on an on-going basis in order to inform organisational decision making when planning future developments and strategies.

This standard is for those involved in informing or developing adult learning operational planning in their organisations, as well as those who contribute to developing and improving adult learning provision in the community.

## Performance criteria

*You must be able to:*

1. gather available information so that you can assess needs and issues regarding the current and future take up and provision of adult learning
2. check for any gaps in your organisation's current provision
3. determine the level and nature of adult learning provision in the local community
4. use participant feedback to support decision making and future planning
5. discuss and agree with adults the opportunities for enhancing and developing your organisation's provision
6. evaluate the effects of local, regional and national developments on adult learning provision
7. collate and assess findings, identifying trends and patterns which will help you with your operational planning
8. determine the future requirements of stakeholders and agencies through consultation
9. evaluate your findings, draw conclusions and make recommendations for the range of activities required by adults and the community, taking into account the feasibility and benefits for your organisation
10. meet the values and principles underpinning the requirements of this standard relevant to your sector

## Knowledge and understanding

*You need to know and understand:*

1. legal, regulatory and ethical requirements impacting upon the provision of adult learning and in investigating needs
2. the concept of needs analysis
3. who the relevant agencies and stakeholders are
4. the types of information that might be provided by adults, relevant agencies and other stakeholders appropriate to establishing community needs from adult learning provision
5. methods of obtaining feedback from adults and relevant agencies and stakeholders, and their relative advantages and disadvantages
6. how to access sources of information and support in investigating community needs and identifying opportunities
7. factors influencing adult learning provision in the community
8. the importance of ensuring objectivity when evaluating feedback and the factors to consider when assessing its validity
9. techniques for analysing qualitative and quantitative information
10. the legislative and ethical restrictions relating to collecting, storing and sharing information
11. how technology can be used to collect and analyse information
12. the importance of long and medium-term planning to the successful achievement of your organisation's objectives
13. the importance of making a financial assessment of the opportunities identified, and how to do this
14. the values and principles underpinning adult learning in relation to the requirements of this standard

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**Glossary**

Technology

This refers to both hardware and online tools/apps which can be used in practice and communication (including social media).

CLDAL1

Monitor, evaluate and respond to the impact of trends and developments in Adult Learning in the community



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**Developed by** CLD Standards Council Scotland

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**Relevant Occupations** Adult Learning Worker

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**Suite** Adult Learning

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**Keywords** adult learning

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## Overview

This standard is about presenting information to support the formulation of strategy, policies and activities for adult learning provided by the organisation, as well as contributing to reviews and influencing local, regional and national policy.

You will determine strategic priorities for adult learning, develop an associated strategic plan for the delivery of adult learning and monitor the operations in relation to the overall objectives.

This standard is suitable for adult learning practitioners and managers who are involved in contributing to and influencing adult learning strategy. It is also suitable for those who develop adult learning strategies, prioritise resources and plan and agree associated programmes.

## Performance criteria

### *You must be able to:*

1. consult with agencies/organisations to obtain information appropriate to those parts of the community served by your organisation
2. ascertain trends and developments in the interests, needs and involvement of adult learners in the adult learning activities in the community, and their impact upon adult learning provision
3. prioritise changes required in policies, plans and activities according to the extent to which they have addressed the needs of adult learners
4. assess available options for choosing or developing adult learning programmes which are consistent with the priority areas and their needs
5. develop recommendations for improving and implementing adult learning strategy and procedures
6. determine and agree with relevant people the priority areas for the focus of your organisation's resources
7. assess and analyse risks associated with the options proposed, balancing the identified risks with the desired outcomes
8. present recommendations for enhancing adult learning strategy, policy and provision to the relevant people
9. identify opportunities for strategic partnerships and links with other agencies towards achieving the required aims
10. agree with relevant parties the steps to develop new opportunities and associated activities, and the actions, resources, roles and responsibilities of all those involved
11. apply key performance measures and methods for monitoring and evaluating the effectiveness of agreed programmes and strategy
12. meet the values and principles underpinning the requirements of this standard relevant to your sector



## Knowledge and understanding

*You need to know and understand:*

1. legal, regulatory and ethical requirements which relate to adult learning, and the impact on your own activity
2. methods of forecasting trends and developments and identifying factors which may affect policies and strategies in adult learning
3. the role of your organisation, its activities, policies, strategies and procedures
4. the importance and value of long and medium-term planning to the success of the organisation
5. the functions, needs, expectations and activities of principal and other agencies within adult learning and how they relate to your own organisation
6. relevant learners and community groups who have a stake in the development of adult learning policy and strategy and factors affecting their support for adult learning
7. the principles and processes which underpin policy and strategy development and the factors and priorities which may influence the development and acceptance of policies
8. methods and tools to analyse and evaluate relevant information and assess implications, and draw conclusions
9. methods to involve and consult with communities and other agencies, partners and stakeholders when agreeing priorities and developments
10. the common issues which may be experienced when seeking to implement new strategies
11. how to develop plans and programmes for adult learning opportunities which identify activity, roles, resources and other key areas
12. the resources available to your organisation and sources of information that can aid the prioritisation of resources
13. how to assess potential risks in relation to the achievement of aims and how to mitigate these risks
14. the principles of confidentiality, and how to develop guidelines for exchanging information between learners and agencies
15. your role and responsibilities and from whom assistance and advice should be sought where necessary
16. the values and principles underpinning adult learning in relation to the requirements of this standard

## Glossary

### Resources

This covers any physical or human resource that supports the adult learning process and could include technical equipment, IT-based resources, buildings, sources of specialist knowledge, local assets.

## Influence and develop adult learning strategy

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<b>Relevant Occupations</b>	Adult Learning Worker
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<b>Suite</b>	Adult Learning
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<b>Keywords</b>	adult learning
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## Overview

This standard is about initiating, building and maintaining relationships with learners to make sure they are at the centre of, and driving, their own learning and development.

## Performance criteria

### *You must be able to:*

1. establish contact with learners using suitable locations, resources and channels
2. provide learners with information about your role and responsibilities and how you may work together
3. show respect for learners' needs and preferences and that you value their point of view
4. discuss and agree the basis, benefits and boundaries for learner-centred relationships with learners
5. enable learners to identify and talk about their needs
6. adapt your responses to learners to show you are aware of their strengths as well as their needs
7. seek learners' views on the relationships and how these could be improved
8. reflect on your relationships with learners and adapt your approach to meet the evolving needs of learners
9. agree with learners the type and amount of support required towards achieving their goals and assist in securing the support agreed, in line with your level of authority and organisational requirements.
10. monitor learners' activity to ensure their physical safety and mental wellbeing and respond to changes in behaviour
11. deal with misunderstandings, disagreements and barriers to progression in ways that maintain positive relationships
12. develop learner-centred relationships in ways that enhance learners' self-esteem, self-confidence and ability to take ownership of their own development
13. communicate with learners in ways that are appropriate to them, including the use of technology where appropriate, recognising when there are communications difficulties and adapting the way you communicate accordingly
14. check that learners have understood what you are communicating
15. act in ways that adhere to the ethical practice required within your organisation or profession
16. challenge any prejudice, use of stereotypes, discrimination and unethical or oppressive behaviour
17. encourage individual autonomy in the learning process
18. promote inclusivity, diversity and equality of opportunity
19. maintain confidentiality and security of individual information that meets relevant legal requirements and organisational policies
20. demonstrate understanding of legal requirements, local procedures and your own accountability for safeguarding young people and vulnerable adults

## Knowledge and understanding

*You need to know and understand:*

1. legal, organisational and policy requirements relevant to your role and the activities being carried out
2. relevant ethical principles and codes of professional ethical practice and the consequences of not adhering to them
3. the benefits of building learner-centred relationships based on respect and recognition of learners' strengths and individuality
4. how to ensure your practice supports learners' needs
5. how to encourage learners' ownership of the learning process
6. methods of supporting and building learners' self-esteem, confidence and empowerment
7. why it is important to set and agree boundaries for the relationship with learners and how to do this effectively
8. the cultural, linguistic, social, economic, emotional, physical and educational factors which impact on learning experience throughout life
9. locations in the community where adults meet
10. the role and scope of the provision in your local area
11. the importance of building trust and rapport with adults, and methods for achieving this for a range of adults
12. principles of effective communication including how to adapt your approach to different contexts and identification of barriers to communication their causes, and ways to overcome them
13. different styles and forms of communication that may be appropriate for communicating with adults, including electronic channels
14. the importance of non-verbal communication, such as body language, and how others use and interpret body language in different ways
15. the boundaries and limits of own professional expertise
16. the boundaries of confidentiality, when it is appropriate to disclose confidential information to others and the processes required
17. measures to safeguard young people and vulnerable adults
18. the importance of sharing information and expertise with others, where appropriate, for the benefit of learners
19. the importance of non-judgmental/non stereotyped attitudes and approaches and how you ensure that these underpin your practice
20. what support you can seek when you are involved in conflict situations

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## Glossary

### Resources

This covers any physical or human resource that supports the adult learning process and could include technical equipment, IT-based resources, buildings, sources of specialist knowledge, local assets.

### Technology

This refers to both hardware and online tools/apps which can be used in practice and communication (including social media).

CLDAL3

Build and maintain relationships with learners to ensure a learner-centred approach



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**Relevant Occupations** Adult Learning Worker

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**Suite** Adult Learning

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**Keywords** adult learning

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## Overview

This standard is about developing and maintaining good relationships with the wider community in order to support and develop adult learning. This could include, liaising with other local organisations and learning about the wider community through a number of means such as online and social media channels.

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## Performance criteria

*You must be able to:*

1. find out information about local resources, provision of services and facilities
2. clarify your understanding of stakeholders with learners and colleagues
3. identify and establish contact with stakeholders in a professional manner
4. use appropriate methods to communicate with stakeholders
5. identify opportunities for meeting and networking with stakeholders
6. raise awareness amongst stakeholders of adult learning and its value
7. share relevant information and knowledge with stakeholders
8. discuss opportunities for supporting adult learning with stakeholders
9. evaluate the contribution of stakeholders to supporting participants within the community

## Knowledge and understanding

*You need to know and understand:*

1. information that is needed to identify key stakeholders within the local community and how to obtain it
2. techniques for establishing relationships
3. methods and approaches to networking and the skills necessary to network successfully
4. appropriate ways of contacting key stakeholders through formal and informal methods
5. key cultural, linguistic, social, ethical and political issues in networking within the local community, and how any potential barriers can be minimised
6. what information can be shared with stakeholders and the purpose of sharing such information
7. ways to promote the value of adult learning to the wider community
8. ways in which stakeholders can support adult learning

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## Glossary

### Resources

This covers any physical or human resource that supports the adult learning process and could include technical equipment, IT-based resources, buildings, sources of specialist knowledge, local assets.

CLDAL4

Build and maintain relationships with stakeholders and the wider community



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**Relevant Occupations** Adult Learning Worker

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**Suite** Adult Learning

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## Overview

This standard is about letting people know about learning programmes that are available to them, using a variety of forms including printed material, mail or digital channels. It is also about supporting learners through the learning process by, for example, providing them with information and advice, helping them overcome barriers, helping them access the learning and experience they need, monitoring progress and providing constructive feedback.

## Performance criteria

*You must be able to:*

1. prepare publicity and information materials using appropriate formats and languages
2. ensure that publicity and information about programmes is accessible, promotes diversity and inclusion and meets the needs of the audience
3. check that publicity and information materials are accurate and up to date
4. explain to learners how they can access opportunities
5. provide information about programmes in response to telephone, electronic or verbal requests
6. review and evaluate the effectiveness of the information and publicity
7. provide the learner with information and advice relevant to their needs
8. establish and maintain a positive relationship with the learner which encourages and motivates learning
9. enable the learner to engage with, and contribute to, their own learning
10. assist the learner to access the skills, knowledge and experience they need
11. help the learner overcome any barriers that prevent them taking a full part in the learning process
12. support the learner in taking responsibility for their learning
13. provide constructive feedback to the learner
14. review learner progress and help them adapt their plans as necessary

## Knowledge and understanding

*You need to know and understand:*

1. the organisational, legal and professional requirements that should be followed when planning and promoting learning programmes
2. the different methods that can be used to publicise learning programmes and the reasons why one method may be more suitable than another in particular situations
3. the characteristics of a relationship that supports learners' progress and provides them with motivation to learn
4. the types of information and advice that learners may require and how to provide or access this
5. different strategies to enable learners to engage with learning
6. aspects of equality and diversity that need to be addressed when supporting learners
7. the range of techniques through which different types of learners can contribute to their own learning
8. the types of barriers to learning that different types of learners experience and how to address these
9. how to help learners with different types of learning needs access the skills, knowledge and experiences they need to progress
10. the boundaries of own role and when to refer the learner to other sources of help and support
11. the range of resources, including support from others and technology based solutions, that are available to support learners
12. why it is important that learners take responsibility for their own learning and different methods of helping them to do so
13. the factors which are important in helping learners to review their progress and, where necessary, adapt their plans for learning and progression
14. methods that can be used to enable learners to provide honest and constructive feedback on their experiences and how to use this feedback when it has been collected
15. different methods of providing the learner with constructive feedback and how to use these methods effectively
16. the importance of reviewing learner progress and appropriate times to do so
17. different methods of presenting evidence of learner achievement to others



## Glossary

### Resources

This covers any physical or human resource that supports the adult learning process and could include technical equipment, IT-based resources, buildings, sources of specialist knowledge, local assets.

### Technology

This refers to both hardware and online tools/apps which can be used in practice and communication (including social media).

## Engage and support learners

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<b>Relevant Occupations</b>	Adult Learning Worker
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<b>Suite</b>	Adult Learning
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<b>Keywords</b>	adult learning
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## Overview

This standard is about planning and delivering learning activities using a range of methods to create a safe and supportive learning environment. This could take place on a one to one basis or in groups, face to face or remotely/virtually.

## Performance criteria

*You must be able to:*

1. prepare an environment conducive to effective learning relevant to the delivery methods.
2. manage a group environment in which learners feel included, valued, supported and confident, using appropriate strategies to manage group dynamics and behaviour and optimise learning
3. communicate with learners in a way that meets individual and group needs
4. agree clear and measurable outcomes with learners
5. use a range of learner-centred delivery methods, activities and resources to meet the needs of learners, as appropriate to planned outcomes
6. use delivery strategies that increase confidence and promote the ability of learners to take responsibility for their own development
7. balance and adjust delivery to meet individual needs while achieving planned group outcomes and agreements
8. monitor learner response and use appropriate strategies to motivate learners
9. encourage effective communication
10. support learners to review their learning and manage their progression
11. use feedback to assess impact of learning activities
12. maintain records of individual development that support learning and comply with relevant legislation and organisational requirements
13. act in ways that adhere to the ethical practice required within your organisation or profession
14. promote inclusivity, diversity and equality of opportunity
15. maintain confidentiality and security of individual information that meets relevant legal requirements and organisational policies
16. maintain the health and safety of learners, self and other people
17. demonstrate understanding of legal requirements, local procedures and your own accountability for safeguarding young people and vulnerable adults

## Knowledge and understanding

*You need to know and understand:*

1. how to involve learners in planning, development and delivery of activities
2. how to encourage learners' ownership of the learning process
3. the barriers to learning and how to recognise and overcome them
4. different delivery strategies and how they affect individual motivation and take into account different learning styles
5. the potential of technology to improve delivery and how to overcome any limitations it presents
6. how to define clear and measurable outcomes for activities
7. the resources necessary for the different types of activity
8. the range of opportunities that learning and personal development may cover
9. the range of development methods available to learners
10. how to minimise the adverse effects of location and environment on activities and individual engagement
11. how to evaluate activities using learners' feedback and measurement against outcomes
12. legal, organisational and policy requirements relevant to your role and the activities being carried out
13. relevant ethical principles and codes of professional ethical practice and the consequences of not adhering to them
14. the boundaries and limits of own professional expertise
15. the boundaries of confidentiality, when it is appropriate to disclose confidential information to others and the processes required
16. measures to safeguard young people and vulnerable adults

## Glossary

### Resources

This covers any physical or human resource that supports the adult learning process and could include technical equipment, IT-based resources, buildings, sources of specialist knowledge, local assets.

### Technology

This refers to both hardware and online tools/apps which can be used in practice and communication (including social media).

## Plan and deliver learning

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<b>Relevant Occupations</b>	Adult Learning Worker
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<b>Suite</b>	Adult Learning
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<b>Keywords</b>	adult learning
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## Overview

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



## Performance criteria

*You must be able to:*

1. identify the resource needs of learners or groups
2. identify resources which are appropriate to the target group and the purpose for which they are required
3. develop and prepare resources appropriate to the identified need
4. support the development and use of learner-generated resources as appropriate
5. adapt resources ensuring they are consistent with learning needs and professional practice
6. ensure resources are consistent with legislative, safety, equality and diversity, inclusion and professional guidelines
7. check and test the resources to ensure they meet required standards and learner needs
8. provide guidance to anyone else who is using the resources

## Knowledge and understanding

*You need to know and understand:*

1. the factors that need to be considered in the effective preparation and development of learning resources, including those for the learning environment, learning materials and equipment
2. the different types of resources that can be used to support learning
3. the range of resources available to support different types of needs
4. the importance of distinguishing between different user needs and the factors which are important in selecting and developing resources to meet these needs
5. how to identify costs and timescales for resource development
6. the factors which are important in selecting and developing resources to meet the needs of different learners, taking account of the need for equality and diversity
7. how to ensure that the language, style and format of the materials are appropriate to the needs of the learners.
8. how to develop simulated exercises that replicate real-life challenges
9. how to make adaptations to the learning environment to support the learning process
10. how to set-up and use equipment to support learning and development
11. the contribution and challenges that technology can make to the learning process
12. development and adaptation of different types of resources and the challenges posed by these
13. the types of adaptations that could be made to resources to make them more appropriate to learning needs and user requirements
14. how to develop guidance for the use of resources and how to encourage consistent application
15. the importance of checking and testing resources to make sure they are of the required standard and how to do this effectively
16. the legislative, safety and professional guidelines relating to the development and adaptation of resources, including those relating to intellectual property, copyright and patents

## Glossary

### Resources

This covers any physical or human resource that supports the adult learning process and could include technical equipment, IT-based resources, buildings, sources of specialist knowledge, local assets.

### Technology

This refers to both hardware and online tools/apps which can be used in practice and communication (including social media).

Develop and prepare resources

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**Suite** Adult Learning

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## Overview

This standard is about providing ongoing support to help learners achieve their learning goals and objectives. Support may be from yourself, other organisations and a wider network of interested parties. This standard is about working with learners to set appropriate goals, objectives and action plans based on knowledge, skills, career, learning and support needs.

This could take place on a one to one basis or in groups, face to face or remotely/virtually.

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## Performance criteria

### *You must be able to:*

1. support learners to identify their expectations, strengths, needs and aspirations
2. agree with learners the actions needed, in relation to their needs and aspirations
3. encourage learners' independence and ownership of their learning
4. communicate in ways that engage learners and keep them motivated
5. encourage individual autonomy in the learning process, motivating learners to overcome barriers to progress and achievement
6. discuss and agree the basis, benefits and boundaries of your role in supporting learners
7. balance the need to share information to aid learners' progression with security and confidentiality requirements
8. record relevant support and development information in line with organisational requirements
9. evaluate the impact of support and plan improvements as required
10. act in ways that adhere to the ethical practice required within your organisation or profession
11. challenge any prejudice, use of stereotypes, discrimination and unethical or oppressive behaviour
12. promote inclusivity, diversity and equality of opportunity
13. maintain confidentiality and security of individual information that meets relevant legal requirements and organisational policies
14. demonstrate understanding of legal requirements, local procedures and your own accountability for safeguarding young people and vulnerable adults

## Knowledge and understanding

*You need to know and understand:*

1. how to manage learners' needs within the limits of the provision offer
2. how to involve learners in all stages of the learning process to develop ownership of their learning
3. andragogical principles and methods which support learners to progress their learning
4. principles of effective communication
5. the strengths and weaknesses of different interventions, techniques and approaches for supporting learners
6. the barriers to learning, how to recognise them and strategies to overcome them
7. how learners' internal and external influences can affect their learning
8. methods of probing, questioning and encouraging reflection to assess learners' strengths, needs and aspirations
9. how to keep up-to-date with developments in interventions, technology, techniques and approaches and how to use them with learners
10. how to use and record results of chosen interventions, techniques and approaches
11. the boundaries and limits of own professional expertise
12. the boundaries of confidentiality, when it is appropriate to disclose confidential information to others and the processes required
13. measures to safeguard young people and vulnerable adults
14. legal, organisational and policy requirements relevant to your role and the activities being carried out
15. relevant ethical principles and codes of professional ethical practice and the consequences of not adhering to them

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**Glossary**

Technology

This refers to both hardware and online tools/apps which can be used in practice and communication (including social media).



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<b>Relevant Occupations</b>	Adult Learning Worker
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<b>Suite</b>	Adult Learning
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<b>Keywords</b>	adult learning
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## Overview

This standard is about helping learners to evaluate their progress and achievement against goals and learning objectives, identify barriers and adapt their plans for the future.

The process should enable learners to develop the skills to review their own progress and implement their learning objectives.

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## Performance criteria

### *You must be able to:*

1. provide opportunities for learners to be involved in all stages of the learning process and develop ownership of their learning
2. help learners to apply their learning
3. encourage learners to identify any barriers to progress and achievement
4. motivate learners to overcome barriers to progress and achievement
5. enable learners to identify, review and update learning objectives
6. encourage individual autonomy in the learning process
7. act in ways that adhere to the ethical practice required within your organisation or profession
8. challenge any prejudice, use of stereotypes, discrimination and unethical or oppressive behaviour
9. promote inclusivity, diversity and equality of opportunity
10. maintain confidentiality and security of individual information that meets relevant legal requirements and organisational policies
11. demonstrate understanding of legal requirement, local procedures and own accountability for safeguarding young people and vulnerable adults

## Knowledge and understanding

*You need to know and understand:*

1. the process of progress review, different types and ways of giving feedback
2. the positive effect on motivation of recognising achievements
3. how to measure success against goals and learning objectives
4. how, why and what account should be taken of prior learning and experience
5. the barriers to learning, how to recognise them and strategies to overcome them
6. the potential of technology to improve support and how to overcome any limitations it presents
7. why goals and objectives may need to change
8. appropriate sources of specialist support within and outside the organisation to meet the specific needs of learners
9. how to involve learners in all stages of the learning process to develop ownership of their learning
10. legal, organisational and policy requirements relevant to your role and the activities being carried out
11. relevant ethical principles and codes of professional ethical practice and the consequences of not adhering to them
12. measures to safeguard young people and vulnerable adults
13. the boundaries and limits of own professional expertise
14. the boundaries of confidentiality, when it is appropriate to disclose confidential information to others and the processes required

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**Glossary**

Technology

This refers to both hardware and online tools/apps which can be used in practice and communication (including social media).

CLDAL9

Assist learners to review their own progress and implement their development objectives



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**Developed by** CLD Standards Council Scotland

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**Version Number** 1

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**Validity** Current

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**Status** Original

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**Originating Organisation** N/A

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**Original URN** N/A

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**Relevant Occupations** Adult Learning Worker

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**Suite** Adult Learning

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**Keywords** adult learning

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## Overview

This standard is for those whose work involves encouraging people to reflect upon their learning and to apply this in other areas of their lives, establishing goals for their future development. It may take place in an individual or group setting.

Learning in this standard includes formal, non-formal and informal learning as well as learning from experience, communication and through discussion.

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## Performance criteria

*You must be able to:*

1. assist learners to explore the benefits of ongoing learning
2. create opportunities for learners to reflect on their learning and life experiences
3. assist learners to develop strategies to cope with challenging situations regarding their learning journey
4. assist learners to develop the ability to take charge of their own review sessions
5. assist learners to develop clear and achievable, personal and group development goals
6. assist learners to undertake activities which reflect their learning style to achieve their goals
7. signpost sources of support which will help learners to carry out and review their learning and development
8. meet the values and principles in relation to the requirements of this standard



## Knowledge and understanding

*You need to know and understand:*

1. the importance of encouraging learners to reflect on their own experiences and draw their own learning from them
2. activities and methods for explaining and promoting the benefits of ongoing learning, and associated sources of support
3. how to involve learners in all stages of the learning process to develop ownership of their learning
4. techniques for creating an environment where it is safe to communicate openly and honestly about experiences, learning and aspirations
5. techniques for facilitating and monitoring group dynamics, enabling learners to focus on important issues for them, including those they find challenging
6. how to empower learners to take ownership of the learning process
7. how to work with learners to identify achievable goals, and mechanisms for recording their development
8. methods of learning and other theories relevant to development planning
9. the importance of giving and receiving feedback effectively and methods for achieving this
10. activities and techniques that can be used for monitoring and reflecting on personal and group development
11. the sources of support for learners as they implement their development plans and deal with issues which are beyond your remit
12. how learning might be applied in other areas of life
13. how and when to use accreditation to enhance learning
14. types of accredited learning
15. the value of informal, non-formal, formal, learning from experience, communication and how these can enhance the development of learners
16. the values and principles in relation to the requirements of this standard

CLDAL10

Enable learners to identify, reflect and use their learning to enhance their future personal development



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## Glossary

CLDAL10

Enable learners to identify, reflect and use their learning to enhance their future personal development



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**Developed by** CLD Standards Council Scotland

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**Validity** Current

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**Originating Organisation** N/A

---

**Original URN** N/A

---

**Relevant Occupations** Adult Learning Worker

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**Suite** Adult Learning

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**Keywords** adult learning

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## Overview

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

## Performance criteria

*You must be able to:*

1. ensure learners understand the purpose, requirements and processes of assessment
2. plan assessment to meet requirements and learner needs
3. use assessment methods that are valid, authentic, robust, reliable, current and sufficient.
4. identify and collect evidence that is valid, authentic, reliable, robust, current and sufficient.
5. make assessment decisions against specified criteria in accordance with the relevant assessment guidance
6. provide feedback to the learner that affirms achievement and identifies any additional requirements
7. maintain required records of the assessment process, its outcomes and learner progress
8. work with others to ensure the standardisation of assessment practice and outcomes
9. reflect on own practice and identify professional development needs

## Knowledge and understanding

*You need to know and understand:*

1. the organisational, legal and professional requirements that should be followed when planning learning and development programmes
2. the current quality requirements for assessment processes and systems in your area of responsibility
3. the key concepts and principles of quality assurance
4. the key concepts and principles of assessment
5. the role of the assessor and the relevant requirements of the role
6. the roles of those involved in maintaining the quality of assessment and the relevant requirements of these roles
7. the agreed procedures for planning, preparing for and carrying out assessments
8. appropriate criteria for judging the quality of the assessment process
9. how to ensure the health and safety of the learner is maintained during assessment
10. the range of information that should be made available to learners
11. the current criteria against which assessments are made and the current regulations and requirements relating to their assessment
12. guidelines for assessment planning as appropriate to own area of responsibility
13. how to involve learners in the planning of assessments
14. how assessment arrangements can be adapted to meet the needs of individual learners
15. how to make the assessment environment appropriate to the learner's needs and the criteria being assessed.
16. the uses, benefits and drawbacks of different assessment methods
17. the types of risks that may be involved in the assessment process and how to manage these
18. issues related to equality and diversity and that may affect the assessment process and how to address these
19. how to make sure that assessment decisions are made against specified criteria and are valid, reliable, fair and robust
20. how to determine when evidence is sufficient to make an assessment decision
21. how to judge the validity, authenticity, reliability robustness and currency of evidence and what to do when there is doubt
22. how to record and store assessment decisions, who they should be made available to and the data protection and confidentiality guidelines that should be followed

23. factors to consider when providing feedback to learners
24. the relevant procedures when there are disputes concerning assessment
25. standardisation processes and how to contribute to these
26. how to co-operate and work effectively with others involved in the assessment process
27. the value and purpose of continuing professional development for assessment practitioners

## Glossary

<table cellpadding="0" width="100%" class="ms-rteTable-default"><tbody><tr><td class="ms-rteTable-default" style="width:100%;">

**\*\*Assessment method\*\***

A means of generating evidence of a candidate's knowledge and/or skills. Ways of measuring learning and development, for example, observation, questioning, checking products of work, setting assignments.

**\*\*Authentic\*\***

The candidate's own work,

**\*\*Candidate\*\***

The individual entered for a qualification. Often used interchangeably with 'learner' and can be used in reference to a learner who is at the point of assessment.

**\*\*Current\*\***

Current evidence should allow decisions to be made confidently about the currency of skills and knowledge claimed, and that the candidate is competent at the point of assessment.

**\*\*Equality\*\***

A state of fair treatment that is the right of all people regardless of differences in, for example, culture, ability, gender race, religion, wealth, sexual orientation, or any other group characteristic.

**\*\*Evidence\*\***



## Assess learner achievement

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This could be for example learner progress, learner attainment, learner satisfaction, staff engagement as appropriate to the quality indicators.

### **\*\*Diversity\*\***

Acknowledging that each individual is unique, and recognizing our individual differences in, for example, culture, ability, gender, race, religion, wealth, sexual orientation, or any other individual characteristic.

### **\*\*Environment\*\***

This includes the physical environment in which learning and development takes place but also covers group dynamics and behaviour.

### **\*\*Fair\*\***

Ensuring that everyone has an equal chance of getting an accurate assessment.

### **\*\*Health and safety\*\***

This includes physical health and safety as well as emotional well-being.

### **\*\*Identify and collect evidence\*\***

This is done through the assessment process, for example by assessor observations, checking products of work, asking questions, setting assignments etc.

### **\*\*Outcomes\*\***

These could be outcomes for the group as a whole – for example enabling team effectiveness – and/or outcomes for the individuals who make up the group – for example individual skill acquisition.

**\*\*Practice\*\***

This refers to the 'way' that you carry out your work and takes account of factors such as your approach to your work

**\*\*Quality requirements\*\***

These could be for example, organisational, legal/statutory, funding or awarding organisation requirements.

**\*\*Reliable\*\***

Consistently achieves the same results with the same (or similar) group of learners.

**\*\*Requirements\*\***

These could be the requirements of the practitioner's own organisation or those of an external organisation, such as awarding organisation.

**\*\*Risk assessment\*\***

This could be a formal and written risk assessment but could be informal and dynamic – monitoring and controlling risk on an ongoing basis. Risk includes health and safety but may also cover other types of risk, for example the risk of problems arising which interfere with the assessment process, or the risk of using inappropriate assessment methods.

**\*\*Robust\*\***

Robust evidence is able to withstand criticism and its use can be easily justified.

**\*\*Role\*\***

This is used to describe the job that you are contracted to carry out and the work that you must do.

**\*\*Safe\*\***

This covers both physical and psychological safety. It also includes ensuring that assessment evidence is safe in the sense that is sufficiently robust to make a reliable judgement that the learner does meet the assessment standard.

**\*\*Sufficient\*\***

Enough evidence as specified in Evidence Requirements or Assessment Strategy.

**\*\*Technology\*\***

This refers to both hardware and online tools/apps which can be used in the delivery and assessment of learning programmes.

**\*\*Valid\*\***

Relevant to the criteria against which the candidate is being assessed.

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## Assess learner achievement

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<b>Version Number</b>	1
<b>Date Approved</b>	28 Jun 2021
<b>Indicative Review Date</b>	31 Mar 2026
<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating Organisation</b>	Lifelong Learning UK
<b>Original URN</b>	LaD09
<b>Relevant Occupations</b>	Education and training Teaching and lecturing, Teaching Professionals, Public Services Professional, Direct learning support
<b>Suite</b>	Learning and Development
<b>Keywords</b>	collective learning needs, development needs, focus of learning, identify learning needs, learning, learning needs analysis, prioritise learning needs, training needs, learner confidentiality, learning development practitioners

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## Overview

This standard is about making sure that participants who want to move on from the learning experience they have had are able to do so. It is about providing information and signposting, but also about making people feel confident that they can move on to other learning opportunities.

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## Performance criteria

*You must be able to:*

1. research and maintain up to date information about learning and development opportunities
2. ensure that information is available in formats, languages and at a level that is accessible to all participants
3. help participants to identify their strengths and interests and previous learning or experience
4. recognise and address the barriers which participants may face in accessing future learning and development
5. provide support and encouragement for participants selecting future learning and development opportunities
6. support participants in making arrangements to access future learning and development
7. identify gaps in provision and respond appropriately

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## Knowledge and understanding

*You need to know and understand:*

1. sources of information on future learning and development opportunities
2. the importance of ensuring that quality information is available in a format, language and level that is accessible to participants
3. the range of learning and development opportunities that may be available and how to access them
4. how to explore the prior learning and experience of participants
5. the nature and causes of barriers to learning and ways to address these
6. the cultural, linguistic, social, economic, emotional, physical and educational factors which impact on learning experiences throughout life
7. the different learning strategies which may be appropriate for adults and children and how to help people to recognise them
8. the implications of learning strategies for the way in which adults and children learn
9. how to recognise gaps in provision and respond appropriately

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<b>Developed by</b>	CLD Standards Council Scotland
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<b>Version Number</b>	1
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<b>Date Approved</b>	30 Mar 2023
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<b>Validity</b>	Current
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<b>Status</b>	Original
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<b>Originating Organisation</b>	LSI
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<b>Original URN</b>	LSIFL10
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<b>Relevant Occupations</b>	Education and training Direct learning support
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<b>Suite</b>	Family learning
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<b>Keywords</b>	Family; Learning; Accessible; Environment; Adults; Children
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## Overview

This standard is about determining sources of funding and other resources and establishing good working relationships with actual and potential fund holders. It includes developing and submitting proposals for funding, or other forms of support, and negotiating the terms of proposals to a successful conclusion. You will also establish contingency plans so that you are able to mitigate against any shortfall in funding.

This standard is suitable for practitioners and managers who have responsibility for securing finance to develop provision.

## Performance criteria

*You must be able to:*

1. establish an up to date list of organisations that provide resources currently, and which might provide resources for future activities
2. develop fully costed proposals and recommendations for obtaining the finances and other resources required to deliver proposed activities
3. agree proposals and recommendations with relevant stakeholders
4. make bid proposal submissions to potential funders
5. address any requests for further information and clarification
6. agree contractual arrangements with funders which set out the terms of the resource provisions
7. update all relevant parties regarding the outcome of the proposal
8. provide those who will make use of the resources with information about any conditions attached to the funding
9. develop contingency plans to address any problems regarding the spend requirements
10. implement a system for effective funding source monitoring
11. meet the values and principles in relation to the requirements of this standard

## Knowledge and understanding

*You need to know and understand:*

1. guidelines and codes of practice and any legislative, regulatory and ethical requirements in relation to types and providers of funding
2. the objectives, plans and resources of your own organisation
3. the proposed activities of your organisation, including those which require finance and resources
4. the organisation's stakeholders and their views in relation to the financing of the organisation's activities
5. the current types and providers of finance and other resources used by own organisation, and other potential types and providers of finance and their associated benefits and risks
6. sources of information on resourcing opportunities, including those within the statutory, private, voluntary and charitable sectors
7. how and when to maximise opportunities and reduce duplication by working in partnership with other stakeholders
8. how to make a business case and promote the benefits of the proposed projects
9. the scope, available resources and purpose of the funding body being approached, and any constraints under which they operate
10. what information is required by the funding body and the correct format for the presentation of the proposal
11. relevant people in your organisation and any key stakeholders who should be consulted on proposals and recommendations for obtaining finance and resources
12. the importance of submitting clear proposals of bids or applications to providers of finance and other resources, and of allowing sufficient time for consideration
13. the type of agreements that should be put in place with providers of finance and what they should cover
14. the type of actions that might need to be taken in the event of a shortfall in funding
15. why it is necessary to put contingency plans in place in relation to obtaining finance and the type of contingencies that might occur
16. the values and principles in relation to the requirements of this standard

**Glossary****Resources**

This covers any physical or human resource that supports the adult learning process and could include technical equipment, IT-based resources, buildings, sources of specialist knowledge, local assets.

## Secure funding and resources

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<b>Developed by</b>	CLD Standards Council Scotland
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<b>Validity</b>	Current
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<b>Status</b>	Original
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<b>Originating Organisation</b>	N/A
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<b>Original URN</b>	N/A
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<b>Relevant Occupations</b>	Adult Learning Worker
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<b>Suite</b>	Adult Learning
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<b>Keywords</b>	adult learning
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## Overview

This standard is about presenting information to support the formulation of strategy, policies and activities for adult learning provided by the organisation, as well as contributing to reviews and influencing local, regional and national policy. You will determine strategic priorities for adult learning, develop an associated strategic plan for the delivery of adult learning and monitor the operations in relation to the overall objectives. This standard is suitable for practitioners and managers who are involved in contributing to and influencing adult learning strategy, such as making suggestions for improvements. It is also suitable for those who develop adult learning strategies, prioritise resources and plan and agree associated programmes of adult learning.

## Performance criteria

### *You must be able to:*

1. consult with agencies to obtain information appropriate to those parts of the community served by your organisation
2. ascertain trends and developments in the interests, needs and involvement of adults in the adult learning activities in the community, and their impact upon adult learning provision
3. look for opportunities for strategic partnerships and links with other agencies towards achieving the required aims
4. prioritise changes required in policies, plans and activities according to the extent to which they have addressed the needs of adults
5. agree with relevant parties the steps to develop new opportunities and associated activities, and the actions, resources, roles and responsibilities of all those involved
6. assess available options for choosing adult learning programmes which are consistent with the priority areas and their needs
7. develop recommendations for improving the procedures for implementing adult learning strategy and procedures
8. determine and agree with relevant people the priority areas for the focus of your organisation's resources
9. assess and analyse risks associated with the options proposed balancing the identified risks with the desired outcomes
10. present recommendations for enhancing adult learning strategy, policy and provision to the relevant people
11. apply key performance measures and methods for monitoring and evaluating the effectiveness of agreed programmes and strategy
12. meet the values and principles in relation to the requirements of this standard

## Knowledge and understanding

*You need to know and understand:*

1. legal, regulatory and ethical requirements which relate to adult learning, and the impact on your own activity
2. methods of forecasting trends and developments and identifying factors which may affect policies and strategies in adult learning
3. the role of your organisation, its activities, policies, strategies and procedures
4. the importance and value of long and medium-term planning to the success of the organisation
5. the functions, needs, expectations and activities of principal and other agencies within adult learning and how they relate to your own organisation
6. relevant learners and community groups who have a stake in the development of adult learning policy and strategy and factors affecting their support for adult learning
7. methods to involve and consult with communities and other agencies, partners and stakeholders when agreeing priorities and developments
8. methods and tools to analyse and evaluate relevant information and assess implications, and draw conclusions
9. the factors and priorities which may influence the development and acceptance of policies
10. the common issues which may be experienced when seeking to implement new strategies
11. how to develop plans and programmes for adult learning opportunities which identify activity, roles, resources and other key areas
12. the resources available to your organisation and sources of information that can aid the prioritisation of resources
13. how to assess potential risks in relation to the achievement of aims and how to mitigate these risks
14. the principles of confidentiality, and how to develop guidelines for exchanging information between learners and agencies
15. your role and responsibilities and from whom assistance and advice should be sought where necessary
16. the values and principles in relation to the requirements of this standard



## Glossary

### Resources

This covers any physical or human resource that supports the adult learning process and could include technical equipment, IT-based resources, buildings, sources of specialist knowledge, local assets.

## Engage in the strategic development of adult learning

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<b>Developed by</b>	CLD Standards Council Scotland
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<b>Originating Organisation</b>	N/A
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<b>Original URN</b>	N/A
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<b>Relevant Occupations</b>	Adult Learning Worker
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<b>Suite</b>	Adult Learning
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<b>Keywords</b>	adult learning
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## Overview

This standard is about promoting equality of opportunity, diversity and inclusion in your organisation. You identify your own and your organisation's responsibilities and liabilities related to equality, diversity and inclusion. You actively promote diversity and inclusion in the way that you behave and the language that you use. You review the diversity needs of colleagues and customers and identify improvements that can be made, taking action to uphold individuals' rights. You maintain systems to monitor, review and report on progress related to equality, diversity and inclusion and seek specialist expertise when required.

This standard is for all managers and leaders.

## Performance criteria

### *You must be able to:*

1. identify your organisation's and your own responsibilities and liabilities under equality, diversity and inclusion legislation and any relevant codes of practice
2. identify your own responsibilities and liabilities under equality, diversity and inclusion legislation and any relevant codes of practice
3. check that your organisation's written equality, diversity and inclusion policy and action plan enables you to carry out your own responsibilities
4. agree revisions to your organisation's written equality, diversity and inclusion policy and action plan with decision makers, if required
5. check that the equality, diversity and inclusion policy and action plan has been communicated to all colleagues and other relevant stakeholders
6. challenge the status quo and seek better alternatives when required
7. promote equality of opportunity, diversity and inclusion by engaging colleagues and other key stakeholders
8. agree management commitment to promoting equality of opportunity, diversity and inclusion
9. check that commitment to promoting equality of opportunity, diversity and inclusion underpins your organisation's vision, values, objectives and plans
10. use language and behaviours that role-models your organisation's commitment to equality of opportunity, diversity and inclusion
11. monitor the language and behaviours used by colleagues to ensure it supports your organisation's commitment to equality of opportunity, diversity and inclusion
12. review the diversity and needs of your organisation's current and potential customers
13. select communication media and styles that meet the needs of different colleagues, customers and situations
14. identify areas where needs are not being satisfied or where the diversity of customers should be improved
15. review the diversity of the workforce, at all levels, in comparison to the population and your organisation's current and potential customers and
16. consider the views and actions of colleagues, team members and other stakeholders when making decisions
17. support colleagues, team members and other stakeholders to encourage use of their knowledge, skills and expertise
18. take action to uphold individuals' rights following your organisation's guidelines for decision-making and building allyship

19. identify areas for improvement in the diversity of the workforce
20. seek specialist expertise in relation to equality, diversity and inclusion issues, where required
21. maintain systems to monitor, review and report on progress in relation to equality of opportunity, diversity and inclusion within your organisation
22. use the findings of your reviews to identify required actions and changes to practice
23. comply with, and ensure others comply with, legal requirements, industry regulations, organisational policies and professional codes

## Knowledge and understanding

*You need to know and understand:*

### General knowledge and understanding

1. your organisation's and your personal responsibilities and liabilities under equality, diversity and inclusion legislation and the relevant codes of practice
2. the different definitions of equality, diversity and inclusion
3. the different forms which discrimination and harassment might take in the workplace
4. the business case for ensuring equality of opportunity and promoting diversity and inclusion
5. the importance of senior management commitment to promoting equality of opportunity, diversity and inclusion and how this can be achieved
6. why it is important to lead by example in terms of your behaviour, words and actions supporting a commitment to equality of opportunity, diversity and inclusion
7. how to recognise when the behaviour, words and actions of colleagues and customers does, and does not, support a commitment to equality of opportunity, diversity and inclusion and the actions that can be taken to correct behaviours
8. the importance of reviewing the diversity and needs of an organisation's current and potential customers to identify areas for improvement and how to review
9. the importance of reviewing the diversity of an organisation's workforce, at all levels, to identify areas for improvement and how to review
10. how to develop a written equality, diversity and inclusion policy and

what it should cover

11. how to communicate the organisation's equality, diversity and inclusion policy to all people who work for the organisation and other relevant parties

12. the sources of specialist expertise in relation to equality, diversity and inclusion

13. how to establish systems for monitoring, reviewing and reporting on progress in relation to equality of opportunity, diversity and inclusion within an organisation

### **Industry and sector specific knowledge and understanding**

14. the industry and sector-specific legislation, regulations, guidelines and codes of practice relating to equality, diversity and inclusion

15. the range of equality, diversity and inclusion issues and developments that are particular to your industry and sector

### **Context specific knowledge and understanding**

16. the overall vision, values, objectives, plans and culture of your organisation

17. why allyship in the workplace is important

18. the planning and decision-making processes within your organisation including the guidelines related to fairness and consistency

19. your organisation's current and potential customers and their needs

20. the current diversity of your organisation's workforce

21. the key stakeholders with an interest in equality, diversity and

inclusion in your organisation

22. your organisation's written equality, diversity and inclusion policy and action plan and how they are communicated to colleagues and to other relevant stakeholders

23. the mechanisms for consulting with colleagues or their representatives on equality, diversity and inclusion issues, and why consideration of their views and actions is important

24. the sources of specialist expertise in relation to equality, diversity and inclusion used by your organisation (internal and external)

25. your organisation's systems for monitoring, reviewing and reporting on progress in relation to equality of opportunity, diversity and inclusion



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**Skills**

1. Building allyship
2. Communicating
3. Consulting
4. Empathising
5. Evaluating
6. Influencing
7. Involving others
8. Leadership
9. Leading by example
10. Monitoring
11. Persuading
12. Planning
13. Reporting
14. Reviewing
15. Valuing and supporting others

INSML008

Promote equality of opportunity, diversity and inclusion in your organisation



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**Developed by** Skills CFA

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**Version Number** 1

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**Date Approved** 12 Feb 2021

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**Validity** Current

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**Status** Original

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**Originating Organisation** Instructus

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**Original URN** CFAM&LBA7

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**Relevant Occupations** Managers and Senior Officials

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**Suite** Management and Leadership

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**Keywords** Management & leadership; strategic; business plan

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## Overview

This standard is about supporting learners to develop their communication skills to represent their views and values to others. It also includes identifying what the needs and interests of learners or groups are and presenting their needs and interests accurately and fairly. Encouraging people to take part and become involved in advocacy supports the development of skills and confidence.

## Performance criteria

*You must be able to:*

1. choose models of advocacy to use according to the advocacy context
2. agree with people the key issues they wish to address through advocacy, the desired outcomes and the information requirements
3. assist people to engage with appropriate people, including decision makers
4. discuss and agree with people opportunities to participate and to represent themselves
5. assist people with planning what they want to communicate
6. assist people to collect sufficient and valid information to enable them to support and present their views and interests
7. agree with people how to tailor their presentation of their views and interests to different audiences
8. help people to develop strategies to cope with any constraints or barriers they face in doing this
9. review available information about the needs of people and collect additional information so that you can advocate on their behalf, with their agreement, where necessary
10. present the interests of people to the audience, listen to the response of others and offer constructive feedback
11. record and maintain records of the information presented and the actions taken
12. review the outcomes of the representations with people, and agree appropriate consequent actions
13. comply with relevant values, codes of practice, guidelines and ethical requirements
14. meet the values and principles in relation to the requirements of this standard

## Knowledge and understanding

*You need to know and understand:*

1. your role and responsibilities within the advocacy of people's views and interests
2. models, methods and techniques of advocacy
3. typical circumstances where people may need advocacy
4. factors affecting the ability of people to participate and represent themselves
5. methods of assessing the skills and confidence of people relevant to presenting their views and interests
6. the importance of establishing realistic goals for the outcome of representations
7. how to agree the advocacy needed with and for people including the goals, information needed and how to present the case
8. the range of situations where representation may take place, and the factors to consider in preparing for these
9. who to contact in order to pursue the interests of people
10. the type of information needed and how to obtain additional information to ensure accurate and fair advocacy
11. the importance of preparation when presenting views and arguments, the needs and expectations of the audience, and methods of achieving this
12. the difference between decision makers and those who influence the decision-making process, and the importance of each
13. communication skills appropriate to presenting views and interests
14. typical issues and areas of concern raised through advocacy and ways to resolve them
15. how to provide feedback and review the outcomes of advocacy with people
16. how to take any required action following the advocacy representation
17. legal, organisational and ethical codes of practice, guidelines and requirements relevant to your role
18. the values and principles in relation to the requirements of this standard

CLDAL13

Advocate with and on behalf of learners so that their interests are represented



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## Glossary

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<b>Developed by</b>	CLD Standards Council Scotland
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<b>Version Number</b>	1
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<b>Date Approved</b>	30 Mar 2023
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<b>Indicative Review Date</b>	30 Mar 2028
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<b>Validity</b>	Current
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<b>Status</b>	Original
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<b>Originating Organisation</b>	N/A
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<b>Original URN</b>	N/A
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<b>Relevant Occupations</b>	Adult Learning Worker
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<b>Suite</b>	Adult Learning
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<b>Keywords</b>	adult learning
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## Overview

This standard is for those who aim to address and improve the well-being of learners, working to identify issues which may affect their well-being and encouraging them to take reasonable care and responsibility for ensuring their own well-being.

Within this standard 'well-being' includes personal, physical and emotional health.



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## Performance criteria

### *You must be able to:*

1. agree with learners the typical factors that could impact their health and well-being
2. establish key criteria to be used by learners to define their state of health and well-being, including risks
3. assist learners to assess their well-being using the agreed criteria
4. discuss the outcome of the assessment and assist people to develop criteria for strategies to enhance their health and well-being
5. support learners to reflect upon their behaviour and determine the causes and consequences of their actions
6. encourage learners to check upon their progress, recognise achievements and address any setbacks
7. provide relevant and up to date information, advice and guidance, in line with your own competence and responsibility
8. maintain confidentiality and records as appropriate in line with legislative and organisational requirements
9. meet the values and principles in relation to the requirements of this standard

## Knowledge and understanding

*You need to know and understand:*

1. the principal agencies and referral routes available to support people regarding their health and well-being, and the routes for accessing these
2. the importance of maintaining people's right to make their own choices
3. local and national socio-economic issues and their impact upon well-being
4. risk factors affecting the well-being of people within the local community, including the digital community
5. why it is important for the people to control the progress and content of discussions, how to make suggestions and when to provide up to date information
6. why it is important to be non-judgemental about the ways that people choose to live and the choices they have made
7. why it is important to help people consider the causes and effects of their choices and behaviour on themselves and others and methods of doing this
8. how culture, beliefs and preferences can affect people's willingness to discuss issues and the strategies which may be used to encourage this
9. strategies for encouraging open and honest discussion, how to respect and acknowledge other's priorities in relation to their well-being and their right to refuse suggestions and information
10. your role and responsibilities and from whom assistance and advice and support should be sought when necessary
11. legal and organisational requirements, including the local, social and political context, impacting upon the provision of information, guidance and support
12. legislative and organisational requirements relevant to the storage, retention and maintenance of information
13. your organisation's policy and procedures regarding confidentiality of information and the disclosure of information to third parties, and the specific circumstances under which disclosure may be made
14. the values and principles underpinning in relation to the requirements of this standard

CLDAL14

Assist learners to assess risk and make informed choices in the management of their health and wellbeing



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## Glossary

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<b>Developed by</b>	CLD Standards Council Scotland
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<b>Version Number</b>	1
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<b>Date Approved</b>	30 Mar 2023
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<b>Indicative Review Date</b>	30 Mar 2028
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<b>Validity</b>	Current
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<b>Status</b>	Original
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<b>Originating Organisation</b>	N/A
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<b>Original URN</b>	N/A
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<b>Relevant Occupations</b>	Adult Learning Worker
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<b>Suite</b>	Adult Learning
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<b>Keywords</b>	adult learning
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## Overview

This standard is about following policies and procedures to make certain that learners and environments are safe and secure.

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## Performance criteria

*You must be able to:*

1. follow organisational policy, procedure and reporting mechanisms, including the confidentiality of such information
2. follow policies and procedures for maintaining appropriate behaviour and for the safeguarding of children and adults
3. demonstrate the importance of safeguarding and of following the correct procedures
4. identify the boundaries of confidentiality before sharing information, both internally and external to your organisation
5. reassure learners of the confidentiality of any disclosure within the requirements of safeguarding procedures
6. share information with others, according to protocols for maintaining confidentiality and using organisational systems and procedures

## Knowledge and understanding

*You need to know and understand:*

1. local and national policies and legislation relating to child/vulnerable adult protection and safeguarding
2. procedures to safeguard children and adults
3. sources of appropriate information and support to help learners
4. how to assess the needs of individual staff in relation to health, safety, child protection and safeguarding laws
5. why it is important to have agreed policies for behaviour and how to implement these
6. the importance of sharing information and concerns about children and adults with others
7. how to maintain confidentiality when sharing information with others
8. the importance of having agreements about confidentiality when sharing information about children and adults with other professionals and organisations

CLDAL15

Take responsibility for the safety and security of learners and environments



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## Glossary



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<b>Developed by</b>	CLD Standards Council Scotland
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<b>Version Number</b>	1
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<b>Date Approved</b>	30 Mar 2023
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<b>Indicative Review Date</b>	30 Mar 2028
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<b>Validity</b>	Current
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<b>Status</b>	Original
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<b>Originating Organisation</b>	N/A
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<b>Original URN</b>	N/A
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<b>Relevant Occupations</b>	Adult Learning Worker
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<b>Suite</b>	Adult Learning
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<b>Keywords</b>	adult learning
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## Overview

This standard focuses on improving provision through collaboration with others. It is about developing and sustaining collaborative, productive working relationships with others in order to share resources to improve provision and provide the best possible opportunities for people in the community. It involves being aware of the roles, responsibilities, interests and concerns of colleagues, agencies and stakeholders and working with and supporting them in various ways. The need to monitor and review the productiveness of working relationships with colleagues, agencies and stakeholders is a key part of this standard.

You establish working relationships and respect the roles and responsibilities of colleagues and stakeholders, actively seeking to understand their perspectives. You identify and resolve conflicts, monitor working relationships and identify aspects that can be improved. You also create a climate of trust providing support to help move difficult or complex situations forward.

In the context of this standard, as well as colleagues, agencies and stakeholders, 'others' can include external partners as well as local, national or global communities of interest or practice.

## Performance criteria

*You must be able to:*

1. establish working relationships with colleagues, partners and stakeholders
2. recognise and respect the roles, responsibilities, interests and concerns of colleagues
3. identify and work with people in other organisations who are empowered to take forward joint work
4. establish and agree shared aims, working arrangements, key performance measures, methods for monitoring and evaluation, and develop coordinated approaches towards these
5. share information and communicate effectively with others using relevant communication tools and technologies
6. provide information to others in accordance with organisational procedures
7. consult with others when making key decisions and when undertaking activities
8. fulfil agreements made with others and revise these agreements so that they remain current
9. monitor and review the productiveness of working relationships with others, seeking and providing feedback, in order to identify areas for improvement
10. challenge any prejudice, use of stereotypes, discrimination and unethical or oppressive behaviour
11. promote inclusivity, diversity and equality of opportunity
12. maintain confidentiality and security of individual information that meets relevant legal requirements and organisational policies
13. demonstrate understanding of legal requirements, local procedures and own accountability for safeguarding young people and vulnerable adults
14. follow the legal, organisational, codes of practice and policies relevant to developing and sustaining productive working relationships with colleagues and stakeholders
15. meet the values and principles in relation to the requirements of this standard

## Knowledge and understanding

*You need to know and understand:*

1. the value and benefit of developing productive working relationships with others
2. the principles and methods of joint and multi-disciplinary working
3. why it is important to have protocols for inter-agency working and the key areas that such protocols should cover
4. how to identify stakeholders, including background information, the nature of their interest in your organisation and their expectations
5. the services offered by others, how they relate to the provision offered by your own organisation, and how to use and access them
6. who from the relevant agencies, partners and stakeholders can provide information and take action, and who to contact there when considering both strategic and operational issues
7. the importance of recognising, taking account of and respecting the roles, responsibilities, interests, concerns and attitudes to potential risks of colleagues and stakeholders
8. how to assess the risks of joint working and ways to minimise these
9. the different types of stakeholder and key principles which underpin the 'stakeholder' concept
10. the existing agreements with colleagues and stakeholders and their identified information needs
11. the importance of monitoring and taking account of wider developments and political issues in relation to stakeholders
12. why you must take into account the culture and values of other organisations and stakeholders
13. the power, influence and politics within your organisation and culture
14. the standards of behaviour and performance that are expected in your organisation
15. principles and tools of effective communication and how to apply them
16. the importance of creating a climate of trust and mutual respect where you have no authority, or shared authority, over those you are working with
17. why communication with colleagues and stakeholders on fulfilment of agreements or any problems affecting or preventing fulfilment is important
18. the importance of understanding difficult situations and issues from colleagues' perspectives and providing support, where necessary, to move things forward
19. how to identify disagreements and/or conflicts of interest with

- colleagues and stakeholders, the damage they can cause to learners and organisations and the techniques that can be used to manage or remove them
20. how to identify and meet the information needs of colleagues and stakeholders
  21. the information it is appropriate to provide to colleagues and stakeholders and the factors that need to be taken into account, including your organisation's and legal procedures regarding confidentiality, data protection and reportable disclosures
  22. how to consult with colleagues and stakeholders in relation to key decisions and activities
  23. how to provide, get and make effective use of feedback from colleagues and stakeholders to improve performance
  24. how to identify and use the mechanisms in place for monitoring and reviewing the effectiveness of working relationships with colleagues and stakeholders
  25. how to delegate responsibilities and allocate resources when building networks
  26. the legal, organisational, codes of practice and policies relevant to developing and sustaining productive working relationships with colleagues and stakeholders
  27. the boundaries and limits of your own professional expertise

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## Glossary

### Resources

This covers any physical or human resource that supports the adult learning process and could include technical equipment, IT-based resources, buildings, sources of specialist knowledge, local assets.

CLDAL16

Develop and sustain working relationships with colleagues and stakeholders



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**Developed by** CLD Standards Council Scotland

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**Version Number** 1

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**Date Approved** 30 Mar 2023

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**Indicative Review Date** 30 Mar 2028

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**Validity** Current

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**Status** Original

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**Originating Organisation** N/A

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**Original URN** N/A

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**Relevant Occupations** Adult Learning Worker

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**Suite** Adult Learning

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**Keywords** adult learning

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## Overview

This standard is about developing and maintaining your professional connections. You define objectives for networking activities, identify relevant professionals, stakeholders and organisations that can support your current and future work. You develop mutually beneficial relationships with your contacts, respecting confidentiality when sharing your own knowledge, skills and competence to support your colleagues and team members. You use the relevant digital technologies for engagement and communication with your professional connections and also follow organisational policies and procedures for sharing information and resources.

This standard is for all managers and leaders.



## Performance criteria

*You must be able to:*

1. define your objectives for collaboration with relevant professionals and stakeholders
2. identify contacts and organisations that support your current work and provide future opportunities
3. create professional networks of contacts which meet your current needs for information and resources
4. compare your own and your colleagues' expectations of professional relationships
5. identify preferred ways of communication with your networks of contacts
6. develop your professional connections to meet your current and future needs for information and resources
7. outline your knowledge, skills and competence with your professional connections
8. provide information about the benefits of collaboration with you
9. assess opportunities presented by your networks of contacts
10. maintain boundaries of confidentiality between yourself and your networks of contacts
11. agree guidelines for exchanging information and resources following your organisational policies
12. encourage your colleagues and team members to share information and knowledge in accordance with confidentiality
13. develop your professional connections in conjunction with your priorities and needs
14. select communication media channels and styles to suit different contacts and professional sectors
15. deliver your position and views where there are differing opinions
16. use the range of digital technologies for engagement, communication and maintaining your professional connections
17. use the information and resources gained through your professional networks to enhance your work
18. comply with legal requirements, industry regulations, organisational policies and professional codes of practice

## Knowledge and understanding

*You need to know and understand:*

### **General knowledge and understanding**

1. the types of professional connections and their features
2. the benefits of connecting with stakeholders and organisations
3. the principles and methods of communication and how to apply them to engaging with professional connections
4. the different communication styles and how to identify individual preferences
5. the methods for developing mutually beneficial relationships with other professionals, stakeholders and organisations
6. how to respond to differences of opinion and deliver your position and views
7. the range of digital technologies for engagement, communication and maintaining your professional connections
8. when and how to use of the information and resources gained through professional networks
9. the principles of confidentiality and the legal and organisational policies
10. how to develop approaches for exchanging information between individuals and organisations

### **Industry and sector specific knowledge and understanding**

11. the industry and sector requirements for the development and maintenance of knowledge, skills and competence

12. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

**Context specific knowledge and understanding**

13. your own values, motivations and emotions, and the effect of these on your own actions

14. your own interests and how these may conflict with the interests of other professionals, stakeholders and organisations

15. your own objectives in developing your professional connections

16. your current and future needs for information and resources

17. the relevant professionals, stakeholders and organisations that can support your work, and vice versa

18. the information and resources that relevant professionals and stakeholders may need from you and your organisation

19. the relevant professionals, stakeholders and organisations in your current professional connections

Develop and maintain your professional connections

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**Skills**

1. Communicating
2. Influencing
3. Information management
4. Learning
5. Managing of self
6. Networking
7. Personal resilience
8. Persuading
9. Presenting information
10. Questioning
11. Risk management
12. Thinking strategically
13. Valuing individuals

Develop and maintain your professional connections

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<b>Developed by</b>	Skills CFA
<b>Version Number</b>	1
<b>Date Approved</b>	12 Feb 2021
<b>Indicative Review Date</b>	01 Mar 2026
<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating Organisation</b>	Instructus
<b>Original URN</b>	CFAM&LAA3
<b>Relevant Occupations</b>	Managers and Senior Officials
<b>Suite</b>	Management and Leadership
<b>Keywords</b>	Management & leadership; develop; maintain; professional networks

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## Overview

This standard is about developing your knowledge base of theories, concepts, techniques, models of effective practice and contextual information and relevant professional codes of practice/conduct - and using them to improve your own role and practice.

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## Performance criteria

*You must be able to:*

1. develop understanding of theories, concepts, models and techniques relevant to own role and area of expertise
2. apply understanding of theory, concepts and effective practice in adult learning to own practice
3. tailor and adapt models and techniques to own role and practice
4. draw upon contextual knowledge and resources to inform practice
5. keep own knowledge base and practice up to date
6. continually review own practice based on developments in theory, concepts, models, techniques and approaches to effective practice
7. share effective practice with other practitioners
8. promote inclusivity, diversity and equality of opportunity and challenge discriminatory practices

## Knowledge and understanding

*You need to know and understand:*

1. sources of relevant theories, concepts, models and techniques and how to access them
2. the range of topics you need to consider when developing and applying theory and effective practice in your role
3. sources of contextual information and how to access them
4. ways to evaluate theories, concepts, models, techniques and contextual information for their usefulness and applicability
5. the contribution of evidence based practice to the development of theories, models, concepts and techniques
6. the purpose and application of research, reflection, self-evaluation and peer review in developing own practice
7. the learners, groups and networks you can work with to improve your own and others' understanding of theory and practice and how to build relationships with them
8. the boundaries and limits of own professional expertise
9. legal, organisational and policy requirements relevant to your role and the activities being carried out
10. relevant ethical principles and codes of professional ethical practice and the consequences of not adhering to them
11. the boundaries of confidentiality, when it is appropriate to disclose confidential information to others and the processes required
12. measures to safeguard young people and vulnerable adults



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## Glossary

### Resources

This covers any physical or human resource that supports the adult learning process and could include technical equipment, IT-based resources, buildings, sources of specialist knowledge, local assets.

CLDAL17

Develop and apply understanding of theory and effective practice in adult learning



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**Developed by** CLD Standards Council Scotland

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**Version Number** 1

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**Date Approved** 30 Mar 2023

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**Indicative Review Date** 30 Mar 2028

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**Validity** Current

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**Status** Original

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**Originating Organisation** N/A

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**Original URN** N/A

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**Relevant Occupations** Adult Learning Worker

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**Suite** Adult Learning

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**Keywords** adult learning

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## Overview

This standard is about fulfilling the legal, regulatory and ethical requirements which impact upon provision/activities.

It also covers ensuring that activities comply with the legal, regulatory and ethical requirements and are consistent with the values and principles. You will implement policies and procedures for your organisation, monitor for any breaches of these and take appropriate action when required.

Comply with legal, regulatory and ethical requirements

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## Performance criteria

*You must be able to:*

1. keep up to date with the relevant legal, regulatory, organisational and ethical requirements and the impact on your own or organisational responsibilities and activities
2. follow relevant policies and procedures to make sure that your organisation meets the necessary requirements
3. confirm that relevant people are aware of policies and procedures for carrying out their role and that they follow them
4. monitor your own or your organisation's activity for any breaches of compliance and the impact of not fulfilling requirements
5. take action to ensure that activity meets all relevant requirements including identifying, reporting and correcting any failures to meet requirements
6. provide full reports about any failures to meet requirements to the relevant people
7. meet the values and principles in relation to the requirements of this standard

## Knowledge and understanding

*You need to know and understand:*

1. policies and procedures within own organisation and area of work that are intended to make sure that the requirements are fulfilled
2. the legal framework which protects yourself and others from abuse or assault at work
3. ways in which requirements may not be met, and the risks of this occurring
4. procedures for reporting any breaches of requirements
5. procedures for dealing with non-compliance, including the necessary requirements for reporting
6. the processes for maintaining relevant policies and procedures, and for making sure that they remain effective
7. current and emerging environmental, social and ethical concerns and expectations relevant to your work
8. legal, regulatory and ethical requirements impacting upon your or your organisation's activities
9. the importance of fulfilling legal, regulatory and ethical requirements, and the impact of failing to do so
10. the values and culture of your organisation and their effect upon its governance
11. the values and principles in relation to the requirements of this standard

Comply with legal, regulatory and ethical requirements

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**Developed by** CLD Standards Council Scotland

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**Version Number** 1

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**Date Approved** 30 Mar 2023

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**Indicative Review Date** 30 Mar 2028

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**Validity** Current

---

**Status** Original

---

**Originating Organisation** N/A

---

**Original URN** N/A

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**Relevant Occupations** Adult Learning Worker

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**Suite** Adult Learning

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**Keywords** adult learning

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## Overview

This standard is about reflecting on your own effectiveness as a practitioner, identifying own learning and development needs and ways in which you can improve your practice through accessing sources of support and opportunities to maintain your continuous professional development.

## Performance criteria

*You must be able to:*

1. review and evaluate own skills, knowledge and practice against current performance requirements
2. set objectives for change and improvement to your practice that are measurable and achievable
3. identify trends and developments relevant to own skills, knowledge and adult learning practice
4. identify and critically reflect on how your values, beliefs and attitudes influence your practice
5. identify and make best use of sources of support and opportunities for continuous professional development and to address areas for development
6. seek feedback to reflect on and evaluate your performance
7. address internal and external constraints that impact on own practice
  
8. plan and access development opportunities needed to keep your knowledge, skills and practice up to date
  
9. use records of actions, development plans and progress to support and inform ongoing reflective practice
  
10. apply new knowledge and skills to consolidate learning and improve practice
11. review the effectiveness of newly acquired knowledge and skills
12. engage with opportunities for support and supervision
13. share effective practice with other practitioners
14. promote inclusivity, diversity and equality of opportunity



## Knowledge and understanding

*You need to know and understand:*

1. the benefits of continuously reflecting on, evaluating and developing the skills, knowledge, practice, efficiency and effectiveness of practice
2. how to monitor the quality of your work and your progress against requirements and plans
3. how to identify personal and professional development priorities and objectives which will improve your competency and effectiveness as a practitioner
4. why you should seek regular feedback on your practice from learners, colleagues, managers and partners
5. how to provide and act on feedback
6. ways to gain objective feedback from learners, colleagues, managers and partners on your performance as a practitioner
7. organisational, team and own professional goals
8. current performance requirements relevant to own practice
9. methods to evaluate and review your values, principles, knowledge, practices, strengths and areas for development
10. the boundaries and limits of own professional expertise and role
11. the boundaries of confidentiality, when it is appropriate to disclose confidential information to others and the processes required
12. your personal values, interests and priorities and how these affect your practice and the people with whom you work
13. the aims, values, policies, procedures, roles and ways of working of own organisation, if applicable
14. how to find and access learning and development opportunities which meet own preferred learning methods and address identified gaps in your knowledge and skills
15. ways to evaluate the effectiveness of learning resources and learning provision you have used
16. the benefits of sharing own learning and development
17. relevant ethical principles and codes of professional ethical practice and the consequences of not adhering to them
18. measures to safeguard young people and vulnerable adults
19. legal, organisational and policy requirements relevant to your role and the activities being carried out

## Glossary

### Resources

This covers any physical or human resource that supports the adult learning process and could include technical equipment, IT-based resources, buildings, sources of specialist knowledge, local assets.

Manage personal development and reflect on current practice

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**Developed by** CLD Standards Council Scotland

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**Version Number** 1

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---

**Indicative Review Date** 30 Mar 2028

---

**Validity** Current

---

**Status** Original

---

**Originating Organisation** N/A

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**Original URN** N/A

---

**Relevant Occupations** Adult Learning Worker

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**Suite** Adult Learning

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**Keywords** adult learning

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## Overview

This standard is for career development practitioners.

This standard is about planning and undertaking research on local, national or international career development information and practice to improve the information and resources available to individuals and practitioners. Research could be about theory and practice in career development or the learning and labour markets.

## Performance criteria

### *You must be able to:*

1. explain the research brief, the information required, how it will be used and how it needs to be presented when planning research
2. identify, and secure access to, resources that enable accurate analysis of information collected
3. apply appropriate and ethical research methods and strategies to obtain information when undertaking research
4. collect data relevant to the aims of the research plan
5. collate, analyse and present information to meet the research brief
6. maintain records of sources, search techniques and strategies together with the results of your research that comply with relevant legislation and organisational procedures
7. analyse and disseminate outcomes
8. identify possible further sources of information and evaluate for relevance and appropriateness
9. evaluate research activity and plan improvements for future research as required.
10. act in ways that adhere to the ethical practice required within your organisation or profession
11. challenge any prejudice, use of stereotypes, discrimination and unethical or oppressive behaviour
12. promote inclusivity, diversity and equality of opportunity
13. maintain confidentiality and security of individual information that meets relevant legal requirements and organisational policies

## Knowledge and understanding

*You need to know and understand:*

1. legal, organisational and policy requirements relevant to your role and the activities being carried out
2. relevant ethical principles and codes of professional ethical practice and the consequences of not adhering to them
3. the boundaries and limits of own professional expertise
4. the boundaries of confidentiality, when it is appropriate to disclose confidential information to others and the processes required
5. measures to safeguard young people and vulnerable adults
6. the requirements of a research brief
7. how to apply research and analysis within your working context
8. effective research practice and the techniques, tools and sources available to your working context
9. how research data is used by organisations
10. how to evaluate research data for relevance, quality and usefulness
11. research tools and techniques appropriate to your area of expertise
12. the potential of technology to improve research and how to overcome any limitations it presents
13. how to methodically manage the research process so that sources can be cited and work repeated as required
14. how to evaluate research activities using colleagues' feedback and measurement against outcomes

## Glossary

### **\*\*Career Development Information\*\***

Includes labour market intelligence (LMI) and other career or learning related information. It could relate to qualifications, learning and training opportunities, internships and placements, employment and career progression opportunities, support organisations or opportunities that can enable the career development of individuals.

### **\*\*Resources\*\***

This covers any physical or human resource that supports the learning and development process and could include technical equipment, digital technologies (including online tools and apps), handouts, workbooks, people – for example external speakers – and visits to places of interest

### **\*\*Technology\*\***

Hardware (devices/kit) and online methods/tools/apps which can be used in the delivery and assessment of learning programmes.

## Plan and undertake research

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<b>Version Number</b>	1
<b>Date Approved</b>	28 Jun 2021
<b>Indicative Review Date</b>	31 Mar 2026
<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating Organisation</b>	CDI
<b>Original URN</b>	CDICRD17
<b>Relevant Occupations</b>	Careers Advisers and Vocational Guidance Specialists, Line Managers, Supervisors and Team Leaders Education and training, Executive Coach, Functional Managers, Helpline Workers, HR Staff, Learning Mentor, Managers and leaders with responsibility for interagency working, Personnel, training and industrial relations managers , Professional Occupations, Research Professionals, Teaching Professionals
<b>Suite</b>	Career Development
<b>Keywords</b>	advice, aspiration, career, client-centred, development, education, employment, equality, ethical, goals, group, individual, information, labour market, learn, motivation, needs, network, objective, partnership, plan, practice, refer, reflect, theory



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## Overview

This standard is for career development practitioners.

This standard is about measuring the impact of provision and refining it using user-feedback and other information. It focuses on monitoring, evaluating and improving the provision offer building on strengths and addressing areas for development.

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## Performance criteria

*You must be able to:*

1. act in ways that adhere to the ethical practice required within your organisation or profession
2. maintain confidentiality and security of individual information that meets relevant legal requirements and organisational policies
3. use monitoring and evaluation methods that will provide accurate and useful information and which are relevant to the target group
4. collect feedback internally and externally in ways that will encourage honest, open and constructive responses
5. analyse and interpret monitoring and evaluation information
6. collate and store information in ways that comply with relevant legislation and organisational requirements
7. monitor and evaluate provision effectiveness and impact at times and intervals that will provide the most realistic results
8. report on and disseminate evaluation results
9. identify improvements or modifications to the provision that are supported by evaluation findings and which will benefit the provision
10. involve the relevant people in agreeing to or implementing improvements or modifications
11. agree clear goals and measurable outcomes for improvements or modifications
12. promote inclusivity, diversity and equality of opportunity

## Knowledge and understanding

*You need to know and understand:*

1. legal, organisational and policy requirements relevant to your role and the activities being carried out
2. relevant ethical principles and codes of professional ethical practice and the consequences of not adhering to them
3. the boundaries and limits of own professional expertise
4. the boundaries of confidentiality, when it is appropriate to disclose confidential information to others and the processes required
5. measures to safeguard young people and vulnerable adults
6. different sources of information on which to base monitoring and evaluation and their relative merits
7. the usefulness of feedback and involvement in the co-design of provision
8. how to collect and interpret management data and feedback
9. how to differentiate between evaluation of quality and impact measurement
10. the range of methods that can be used to monitor and evaluate provision effectiveness and measure provision impact
11. the potential of technology to improve monitoring and evaluation and how to overcome any limitations it presents
12. which monitoring and evaluation methods to select to obtain the required information
13. continuous improvement processes
14. the impact of the provision on specific client groups
15. how to interpret evaluation results to identify areas for provision improvement
16. how to produce and disseminate evaluation results

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## Glossary

### **\*\*Technology\*\***

Hardware (devices/kit) and online methods/tools/apps which can be used in the delivery and assessment of learning programmes.

### **\*\*Provision\*\***

The career development activities offered by a team, service, organisation or sector.

<b>Developed by</b>	CLD Standards Council Scotland
<b>Version Number</b>	1
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<b>Status</b>	Original
<b>Originating Organisation</b>	CDI
<b>Original URN</b>	CDICRD16
<b>Relevant Occupations</b>	Careers Advisers and Vocational Guidance Specialists, Line Managers, Supervisors and Team Leaders Education and training, Executive Coach, Functional Managers, Helpline Workers, HR Staff, Learning Mentor, Managers and leaders with responsibility for interagency working, Personnel, training and industrial relations managers , Professional Occupations, Research Professionals, Teaching Professionals
<b>Suite</b>	Career Development
<b>Keywords</b>	advice, aspiration, career, client-centred, development, education, employment, equality, ethical, goals, group, individual, information, labour market, learn, motivation, needs, network, objective, partnership, plan, practice, refer, reflect, theory