

Associate Diploma in
**Organisational Learning
and Development**

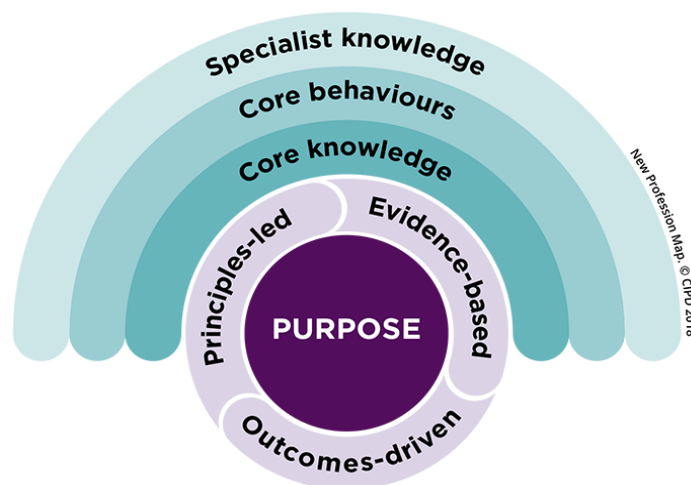


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Introduction

The CIPD Level 5 Associate Diploma in Organisational Learning and Development is a professional qualification based on the CIPD Profession Map. The Map was launched in 2018 having been developed in collaboration with a wide range of experts working at the heart of the profession. It sets the international benchmark for the people profession and provides a strong foundation to give people professionals the confidence and capabilities to guide their decision-making, actions and behaviours.



Each unit within the CIPD Level 5 Associate Diploma in Organisational Learning and Development has clear linkage to the Profession Map. The core units are directly aligned to the core knowledge and core behaviours of the Profession Map, as shown in **Appendix A**.

This qualification specification contains what you need to know about the structure, assessment approach and delivery content for the CIPD Level 5 Associate Diploma in Organisational Learning and Development. This specification should be used to inform your planning, delivery and assessment in combination with the CIPD centre guidance documents.

Regulated Qualifications Framework (RQF)

The UK's Regulated Qualifications Framework (RQF) categorises qualifications in England and Northern Ireland based on their size and their level of challenge or difficulty. The Credit and Qualifications Framework for Wales (CQFW) is the Welsh equivalent to the RQF and applies to qualifications designated in Wales.

The CIPD Level 5 Associate Diploma in Organisational Learning and Development is on the RQF framework, which is regulated by Ofqual and the Council for the Curriculum, Examinations & Assessment (CCEA) and is on the CQFW framework, which is regulated by Qualifications Wales. The qualification numbers for this qualification are 603/5960/2 for the RQF and [tbc - pending approval] for the CQFW.

Qualification size

The size of a qualification is expressed in hours. This is known as the Total Qualification Time (TQT). The TQT is the total number of hours it is estimated that an average learner will take to complete a qualification. For each unit we refer to this as Total Unit Time (TUT).

The TQT is made up of the following:

- Guided Learning Hours (GLH) – this is the time spent by a learner being taught or instructed under the immediate supervision of a lecturer, supervisor or tutor. The learning must be undertaken in real time with the simultaneous physical presence of the learner and that person, or remotely by means of simultaneous online or telephone communication.
- Additional time taken by a learner in preparation, study or any other form of participation in education or training but not under the immediate supervision of a lecturer, supervisor or tutor.

The minimum GLH for this qualification is estimated at 175 hours and the TQT is estimated at 420 hours.

The qualification and units equate to a credit value of 42, which is one tenth of the TQT.

Qualification level

The level of a qualification is determined by looking at the RQF's range of level descriptors and identifying the descriptor which provides the best match to the intended knowledge and skills outcomes for that qualification.

The level descriptors are divided into two categories:

- knowledge and understanding
- skills.

The descriptors set out the generic knowledge and skills associated with the typical holder of a qualification at that level.

Level 5



RQF descriptors for Level 5

At Level 5 a learner:

- can analyse, interpret and evaluate relevant information, concepts and ideas
- is aware of the nature and scope of the area of study or work
- understands different perspectives, approaches or schools of thought and the reasoning behind them
- can determine, adapt and use appropriate methods, cognitive and practical skills to address broadly defined, complex problems
- can use relevant research or development to inform actions
- can evaluate actions, methods and results.

Level comparison

The level of this qualification is comparable to:

- Level 6/7 in Ireland (NFQ IE)
- Level 8/9 in Scotland (SCQF)
- Level 5 European Qualifications Framework (EQF).

Qualification information

Qualification purpose

This qualification builds on the CIPD L3 Certificate in People Practice and is aimed at further expanding learners' independent practice so that they are able to evolve into learning and development leaders and managers.

Learners' work will be mainly operational with some complexity. They will contribute to the thinking around their work, analysing information to inform organisational learning and its future capability. Creating learning environments and supporting employees to continuously develop will create motivation and value through impactful learning.

Using a framework of HR and L&D understanding, behaviours and skills development, this qualification offers opportunity for learners to transition to employment as learning and development specialists.

Qualification objective

This qualification extends and fosters a deeper level of understanding and application, and naturally progresses learners' expertise in learning and development.

It is suited to individuals who:

- are aspiring to, or embarking on, a career in learning and development
- are working in a people practice role and wish to extend their knowledge and skills to help shape organisational learning and development
- are working towards or working in a learning and development role.

Entry guidance

This qualification is designed for learners aged 18+ who want to learn about people practice or L&D practice. Although there are no formal entry requirements, it is expected that centres conduct their own diagnostics to ensure that this qualification is appropriate for the learner. This should include making sure that learners can meet the requirements of the learning outcomes and can access the appropriate literacy and numeracy needed to complete the CIPD Level 5 Associate Diploma in Organisational Learning and Development.

The CIPD has a policy for learners where English is not their first language which gives guidance on appropriate English language entry requirements. The policy can be found on the CIPD website <https://www.cipd.co.uk/membership/students/qualification-policies>.

Qualification structure and rules of combination (ROC)

Qualification structure

| | |
|---------------------------------|----------------------------------------------------------------------------------|
| Qualification title | CIPD Level 5 Associate Diploma in Organisational Learning and Development |
| Qualification number | QN 603/5960/2 |
| RQF level | Level 5 |
| Total qualification time | 420 TQT |
| Guided learning hours | 175 GLH |
| Total credit value | 42 credits |

Rules of combination

To be awarded the CIPD Level 5 Associate Diploma in Organisational Learning and Development, learners are required to **successfully complete a total of seven units**.

Three core units

| Ref | Unit title | RQF | Credit | TUT | GLH |
|--------------|----------------------------------------------------|-----|--------|-----|-----|
| 5CO01 | Organisational performance and culture in practice | 5 | 7 | 70 | 30 |
| 5CO02 | Evidence-based practice | 5 | 6 | 60 | 25 |
| 5CO03 | Professional behaviours and valuing people | 5 | 5 | 50 | 20 |

Plus three specialist units

| Ref | Unit title | RQF | Credit | TUT | GLH |
|--------------|----------------------------------------------------------|-----|--------|-----|-----|
| 5LD01 | Supporting self-directed and social learning | 5 | 6 | 60 | 25 |
| 5LD02 | Learning and development design to create value | 5 | 6 | 60 | 25 |
| 5LD03 | Facilitate personalised and performance focused learning | 5 | 6 | 60 | 25 |

Plus one additional specialist unit to choose from a variety of options

| Ref | Unit title | RQF | Credit | TUT | GLH |
|--------------|-----------------------------------------------|-----|--------|-----|-----|
| 5OS01 | Specialist employment law | 5 | 6 | 60 | 25 |
| 5OS02 | Advances in digital learning and development | 5 | 6 | 60 | 25 |
| 5OS04 | People management in an international context | 5 | 6 | 60 | 25 |
| 5OS05 | Diversity and inclusion | 5 | 6 | 60 | 25 |
| 5OS06 | Leadership and management development | 5 | 6 | 60 | 25 |
| 5OS07 | Well-being at work | 5 | 6 | 60 | 25 |

Recognition of prior learning (RPL) and exemptions

Recognition of prior learning is a method of assessment that considers whether a learner can demonstrate that they can meet the assessment requirements for a unit through knowledge, understanding or skills that they already possess and do not need to develop through a course of learning.

For learners who have completed units from a previous CIPD qualification, there are transfer opportunities to this qualification which have been predetermined by the CIPD as planned exemptions. Details of these are listed in **Appendix B – Exemption mapping**. Non-CIPD qualifications may also be included in this list as appropriate.

For learners who have completed units from non-CIPD qualifications that they deem will map to units of this qualification, they may submit an application form accompanied by clear mapping and evidence of achievement to the CIPD for verification. This will be subject to appropriate fees and limited to exemptions against 50% of the CIPD qualifications as a maximum.

Assessment

Assessment is the process of evaluating an individual's attainment of knowledge, understanding and skills. The CIPD will set assignments for all core units. For the specialist and optional units, centres will be required to set their own assignments, based on guidance provided by the CIPD.

Centres will be required to mark the assignments and internally moderate the marks. The CIPD will conduct moderation sampling and validate centre marking before the release of results to learners.

Assessment focus

Assessment for the CIPD Level 5 Associate Diploma in Organisational Learning and Development is employer driven and aimed at real scenarios that learners may encounter in their future career.

Assessment grading

This qualification is not graded. Learners will receive either a Pass or Fail. All assessment criteria must be met in order to achieve a Pass.

Qualification achievement

All assessments for this qualification are criterion referenced, based on the achievement of specified learning outcomes.

To achieve a **Pass** for this qualification, a learner must have satisfied all the assessment criteria for each unit. If the complete qualification is not achieved, credit can be issued in the form of a statement of standalone unit credit.

Statements of standalone unit credit will be subject to the currency of the existing qualification and CIPD quality assurance checks. The CIPD's decision will be final.

Progression

Successful achievement of the CIPD Level 5 Associate Diploma in Organisational Learning and Development will allow progression onto the CIPD Level 7 Advanced Diploma in Strategic People Management or the CIPD Level 7 Diploma in Strategic Learning and Development.

Link to Apprenticeship

This specification has been mapped to the knowledge elements of the L5 LD Consultant/ Business Partner Apprenticeship. Please refer to **Appendix C** for details of this mapping.

Compliance

No part of this qualification may be altered by centres since it will compromise regulatory compliance. Centres may not amend learning outcomes, assessment criteria, assessment approach, assessment briefs, unit or qualification titling or any other regulated guidance; to do so will deem the learners' achievement null and void and centres will be subject to sanctions by the CIPD.

Unit content

All content provided in each unit is indicative. There is no mandatory content, however it is the centre's responsibility to prepare learners sufficiently so that achievement of all learning outcomes and associated assessment criteria can be achieved.

The unit format is as follows:

| | |
|------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>About the unit</i> | gives a summary of the purpose of the unit |
| <i>What you will learn</i> | details the knowledge and skills a learner will cover |
| <i>Level</i> | indicates the level of the unit within the Regulated Qualifications Framework (RQF) |
| <i>Credit value</i> | is the value given to the unit – it is equal to the Total Qualification Time (TQT) divided by ten |
| <i>Guided Learning Hours</i> | is the average amount of time spent by a learner being directly taught or instructed by a lecturer, supervisor or tutor in real time |
| <i>Total Unit Time</i> | is the average amount of time it will take to complete the unit – this includes guided learning hours, study time, assessment preparation time and assessment time |
| <i>Learning outcomes</i> | set out what a learner will know, understand or be able to do as a result of successful completion |
| <i>Assessment criteria</i> | specify the standard required to achieve each of the learning outcomes via assessment |
| <i>Indicative content</i> | provides guidance on suggested curriculum coverage required to achieve the learning outcomes and assessment criteria |
| <i>Resources</i> | provides a list of publications, books, websites and journals that support the information covered in each unit |

5CO01

Organisational performance and culture in practice



About this unit

This unit examines the connections between organisational structure and the wider world of work in a commercial context. It highlights the factors and trends, including the digital environment, that impact on business strategy and workforce planning, recognising the influence of culture, employee well-being and behaviour in delivering change and organisational performance.

What you will learn

You will learn about the connections between organisational structure, strategy and the business operating environment. You will analyse external factors and trends and assess organisational priorities and issues, including the scale of technology within organisations. You will also interpret theories and models of organisational and human behaviour and the drivers for change. In addition, you will examine how to build diversity and inclusion that aims to promote a positive culture. Finally, you will evaluate the relationship between the employee lifecycle and your work and how people practice connects and supports wider people and organisational strategies, focusing on how to support internal customer needs and ensure that business goals and objectives are delivered in line with customer requirements.

7 credits

Level 5

70 hours total unit time
30 guided learning hours

Learning outcome, assessment criteria and indicative content

1 Understand the connections between organisational structure, strategy and the business operating environment.

1.1 Evaluate the advantages and disadvantages of different types of organisation structures, including the reasons underpinning them.

SMEs, global, private, public, not-for-profit, voluntary. The range of products, services and customers associated with each. Structures, for example functional, divisional, matrix; spans of control; reasons underpinning different structures, advantages and disadvantages and how these link to organisation purpose.

1.2 Analyse connections between organisational strategy, revenue generation, products, services and customers.

How organisational corporate strategies are shaped by the business and external contexts; organisational insights and organisational performance; strategy formulation and implementation; revenue generation, models of strategy formulation; concept of vertical and horizontal integration of strategy.

1.3 Analyse external factors and trends impacting organisations.

Using a recognised analysis tool/approach to analyse factors such as: the market and competitive contexts of organisations, principal demographic, social and technological trends, impact of technology, globalisation and international factors, government policy and legal regulation, international bodies, including the European Union. How factors/trends affect organisational priorities; impact of organisation lifecycle.

1.4 Assess current organisational priorities and the associated issues and causes.

Current priorities and issues: for example expansion, contraction, restructuring, reorganisation, new product or service development, financial targets, skills shortages, labour shortages, technological developments, customer initiatives, staff initiatives, seasonal factors, remote working, furloughing, shift to new product and service delivery.

1.5 Explain how people practices impact on organisational systems and structures.

The extent to which people professionals can impact on systems and structures, for example strategic influence and 'place at top table'. Operational impact through business partnering. Potential impact, for example how the organisation is arranged, type and capability of people recruited to the organisation, how talent is managed, identification of organisational priorities.

1.6 Evaluate the scale of technology within organisations and how it impacts work.

Scale of technology: work systems and 'equipment' in use; currency, updating and efficacy of systems; implementation of technology across the organisation and areas where technology plays a greater or lesser role; organisation spend on technology and wasted spend ('here today gone tomorrow technology'); levels of support for using technology.

Impact of technology: on different functions, products and services provided; on worker efficiency, worker well-being (for example remote working, 'always-on' technology, work-life balance, wider family issues); collaborative working (social media); worker satisfaction (automation), creativity and innovation; how the work has evolved in line with the technological timeline.

2 Understand organisational culture and theoretical perspectives on how people behave at work.

2.1 Interpret theories and models which examine organisational and human behaviour.

Models of organisation and human behaviour: for example team performance, group dynamics, systems theory, high-performance organisations theory, Handy's organisational culture model, motivation theory, nudge theory, SCARF. Management and leadership theory. Autocratic, custodial, supportive and collegial models of organisational behaviour.

2.2 Evaluate the drivers for change and basic models for how these changes are experienced.

Change management approaches: for example Lewin's three-step model of change; Kotter's eight-stage model; reactive approaches, proactive approaches; planned change, emergent change; radical, incremental change; levers for change; drivers of change: wider environment, task environment, internal environment.

Models for how people experience change: for example Tannenbaum and Hanna three-stage model; Kubler-Ross adapted model: the coping cycle; Spencer and Adams seven-stage model; readiness for change and resistance to change.

2.3 Explain how to build diversity and inclusion into your work in order to build a positive culture.

Definition of diversity and inclusion; overview of current diversity and inclusion legislation; impact of no diversity and inclusion within culture; theories and models of organisational culture; levels of

culture; culture typologies. Features of a positive culture, for example shared beliefs, worker engagement, worker voice and involvement, learning organisation, fair processes and policies, shared knowledge.

2.4 Assess how people practices impact on organisational culture and behaviour.

Extent of people practice influence, for example people practice's role of 'people champion', setting behaviour through policy, setting behaviour through role-modelling.

Potential impact on: beliefs and values; levels of openness and trust, for example through policy development; levels of motivation, for example linked to reward, engagement, relations and diversity and inclusion policies; attitude to and provisions and take-up of learning/CPD, linked to L&D policies, levels of staff well-being, linked to overall positioning, management and value placed on employees in the organisation.

2.5 Assess the importance of well-being at work and the different factors which impact well-being.

Importance of well-being at work: how well-being at work impacts on the individual: for example worker engagement; worker motivation; job satisfaction and purpose; physical and mental health; self-image and resilience. Links to psychological contract, work-life balance, wider family issues. Links to motivation, for example expectancy theory's effort-performance-reward-engagement cycle.

Impact: on levels of worker commitment and issues resulting from this for the organisation, for example issues resulting from reduced attendance, punctuality, capability and efficiency. Issues resulting from impoverished relationships and greater potential for stress and interpersonal conflict.

Learning outcome, assessment criteria and indicative content

3 Understand how people practice supports the achievement of business goals and objectives.

3.1 Critically evaluate the relationship between the employee lifecycle and your work.

Definitions of life cycle, for example attraction, recruitment, induction/onboarding, development, retention/engagement including reward/relations, promotion/succession planning, exit/separation, possible post-employment connections. Overview of people practice role at each stage and how this continues to evolve. Touch points along lifecycle for particular areas of people practice (HR, L&D, OD).

3.2 Assess how people practice connects with other areas of an organisation and supports wider people and organisational strategies.

Connections: links between a specific area of people practice (HR or L&D or OD) and other aspects of organisation; links between an area of people practice and the strategy-making function; links between people practice and business/operational functions; services provided by an area of people practice and how they support the business.

Support: How people practice strategy is derived from and supports organisational/corporate strategy and employees.

3.3 Discuss key themes that currently shape the work of an area of people practice and how these impact on the provision of people solutions.

How current trends within the internal and external environment shape the work of an area of people practice and the impact this has on the provision of solutions for people.

3.4 Discuss processes for consulting and engaging with internal customers to understand their needs.

Consulting processes: how people practice liaises with and identifies internal customer needs; consultation and communication processes; stakeholder analysis; needs analysis activities.

3.5 Explain the key components of planning strategies for ensuring that projects are delivered in line with customer requirements.

Key components of project plans: plan components, for example goals, milestones, resources, risks, costs and interdependencies; phases of project management, for example conception, development, realisation and termination.

Strategies to ensure project meets requirements: project leadership to ensure needs are met (for example regular and effective liaison with stakeholders, monitoring activities, evaluation activities).

Books

Armstrong, M. and Taylor, S. (2020) *Armstrong's handbook of human resource management practice*. 15th ed. London: Kogan Page.

Beevers, K., Hayden, D. and Rea, A. (2019) *Learning and development practice in the workplace*. 4th ed. London: CIPD Kogan Page.

Block, P. (2011) *Flawless consulting: a guide to getting your expertise used*. 3rd ed. San Francisco, CA: Pfeiffer.

Boxall, P. and Purcell, J. (2015) *Strategy and human resource management*. 4th ed. London: Palgrave Macmillan.

Cheung-Judge, M.Y. and Holbeche, L. (2015) *Organisation development: a practitioner's guide for OD and HR*. 2nd ed. London: Kogan Page.

Cureton, P. (2017) *Developing and using consultancy skills* (e-book). London: CIPD Kogan Page.

Garden, A. (2016) *The roles of organisation development*. Abingdon: Routledge.

Horn, R. (2009) *The business skills handbook*. London: CIPD Kogan Page.

Stewart, J. and Rogers, P. (eds) (2012) *Developing people and organisations*. London: CIPD Kogan Page.

Thomas, M. (2004) *High-performance consulting skills: the internal consultant's guide to value-added performance*. London: Thorogood.

Key journals

Human Resources

Available at: www.hrmagazine.co.uk/

People Management

Available at:

www.peoplemanagement.co.uk

Personnel Today

Available at: www.personneltoday.com/

Online resources

Houghton, E. (2020) *Strategic human resource management*. Factsheet.

London: Chartered Institute of Personnel and Development.

Available at:

www.cipd.co.uk/knowledge/strategy/hr/strategic-hrm-factsheet

Houghton, E. and Young, J. (2019) *Organisational culture and cultural change*. Factsheet. London: Chartered Institute of Personnel and Development.

Available at:

www.cipd.co.uk/knowledge/culture/working-environment/organisation-culture-change

Sharp, S. and Green, M. (2020) *Organisation development*. Factsheet.

London: Chartered Institute of Personnel and Development.

Available at:

www.cipd.co.uk/knowledge/strategy/organisational-development/factsheet

Websites

www.cipd.co.uk

Website for the Chartered Institute of Personnel and Development (CIPD)

5CO02

Evidence-based practice

**About this unit**

This unit addresses the significance of capturing robust quantitative and qualitative evidence to inform meaningful insight to influence critical thinking. It focuses on analysing evidence through an ethical lens to improve decision-making and how measuring the impact of people practice is essential in creating value.

What you will learn

You will develop understanding of the concepts of evidence-based practice and the tools and methods that are applied to diagnose issues, challenges and opportunities. You will explain the principles of critical thinking and assess how different ethical perspectives can influence decision-making. Key insights and analysis tools and methods will be covered, and you will evaluate the benefits, risks and financial implications of solutions aimed at improving people practice issues. Finally, you will measure the impact and value people practice contributions make to organisations, through collation of key findings and scrutiny of key systems and data.

6 credits

60 hours total unit time
25 guided learning hours

Level 5

1 Understand strategies for effective critical thinking and decision-making.

1.1 Evaluate the concept of evidence-based practice including how it can be applied to decision-making in people practice.

Concept of evidence-based practice: making decisions based on 'effective thinking' and sound evidence, decisions that can be justified to others. Making use of strategies, including critical thinking and analysis in decision-making. Models of decision making, for example the rational model and its limitations, bounded rationality, individual vs group decision-making, group think and group polarisation.

Application of evidence-based practice: effective selection and interpretation of evidence. Effective analysis of situations and issues, critical review of theory, propositions and opinion. Assessing evidence from a variety of sources; identifying bias. Forming judgements and conclusions; developing and testing out own arguments and conclusions.

1.2 Evaluate a range of analysis tools and methods including how they can be applied to diagnose organisational issues, challenges and opportunities.

Range of analysis tools used in people practice: for example environmental analysis tools, strategic review, future state analysis, Porter's five Forces, Force Field analysis, Ansoff matrix, fishbone analysis, critical incident analysis, cause and effect, target operating model, balanced score card, McKinsey 7S; uses and applications within different areas of people practice.

Range of analysis methods: for example interviews, observations, job analysis questionnaires, work sampling, examination of organisation metrics, comparison with sector metrics.

1.3 Explain the principles of critical thinking including how you apply these to your own and others' ideas.

Principles of critical thinking: for example objective rational thinking and well-reasoned argument. Questioning and checking validity of sources and validity of 'evidence'; awareness of bias – conscious and unconscious, yours and others'.

How to apply to own and others' ideas: comparing 'like with like' and recognising different methodologies, approaches and contexts; ensuring clarity of terminology and differentiating between fact and opinion; awareness of personal agendas and 'fake news', not taking information at 'face value'; managing ambiguity and complexity of information; triangulation and testing out of conclusions.

1.4 Assess how different ethical perspectives can influence decision making.

Ethical perspectives: theories of ethics for example utilitarianism, deontology/Kantianism, communitarianism, altruism; ethical values, for example democracy, fairness, honesty, equality; ethics and religion; ethics and business; examples of ethical dilemmas and outcomes.

How they influence decision making: examples of ethical dilemmas and outcomes and the underlying rationales; examples of how different perspectives might result in certain decisions, for example utilitarianism, deontology, the impact of religious and personal beliefs on workplace decision making. Different approaches to dealing with capability and performance issues based on ethical values, compassionate and punitive responses to work issues. How ethics can impact on management and leadership styles and consequently on organisation culture.

Learning outcome, assessment criteria and indicative content

2 Understand the importance of decision-making strategies to solve people practice issues.

2.1 Interpret analytical data using appropriate analysis tools and methods.

Interpretation of raw data derived from the analysis, for example causes, effects, trends, patterns, themes, anomalies, further questions.

2.2 Review relevant evidence to identify key insights into a people practice issue.

Identification of relevance; relevant evidence might include statistical data; evidence relating to processes (for example process documentation, records of errors, complaints or shortfalls, successes); evidence relating to outcomes (tangible/intangible); evidence relating to new or unmet requirements (needs analysis, change analysis, consultation outcomes); opinion and testimony of affected parties; outcomes of critical path analysis.

2.3 Explain a range of decision-making processes to identify potential solutions to a specific people practice issue.

Decision-making processes: for example best fit, future pacing, problem-outcome frame, action learning approaches, De Bono (six thinking hats).

2.4 Provide a rationale for your decision based on evaluation of the benefits, risks and financial implications of potential solutions.

Benefits (for example achievement of objectives, enhanced worker productivity, customer engagement, improved organisational culture, enhanced metrics and business awareness, increased

capabilities, perception of fair policy and processes, legal compliance).

Risks (for example legal, health and safety, financial, reputational, capability, impact on worker or customer engagement).

Financial implications: direct costs (costs of implementing the solution) and indirect costs (for example loss of working time, need for skills upgrade in relation to the solution); costs in relation to the short and long term benefits (cost benefit analysis, return on investment); costs in relation to budget limitations and feasibility of solutions.

3 Be able to measure the impact and value of people practice to the organisation.

3.1 Appraise different ways organisations measure financial and non-financial performance.

Measurements of financial and non-financial performance: for example revenue, gross and net profit, cash flow, return on investment, productivity, key performance indicators, service level agreements, balanced scorecard or similar performance management tools; stakeholder benefits and feedback, customer satisfaction, legal compliance, compliance with environmental standards, sector ratings.

3.2 Scrutinise key systems and data used to inform people practice in relation to measures of work and people performance calculations.

Qualitative data, quantitative data, use of charts, graphs and tables; reports, briefing papers, presentations relating to people performance calculations. Organisation data: datasets related to specific HR/L&D/OD activities (for example: reward data, recruitment data, compliance data,

financial data, L&D related data, OD related data). HR systems, LMS systems.

3.3 Collate key findings for stakeholders from people practice activities and initiatives.

Key findings: Collation of key findings; formats for presenting evaluation of findings; presenting data, for example graphs, charts, diagrams and tables; reporting in relation to stakeholder interests.

People practice activities: for example L&D initiatives, recruitment exercises, performance analysis, workplace change initiatives, OD activities.

3.4 Measure the impact and value of people practice using a variety of methods.

Impact and value: concepts and definitions of impact and value; how people practice creates value.

Impacts: for example short and long term, positive and negative, direct and indirect impacts.

Reasons for measuring: for example check and ensure that objectives being achieved, ensure a people practice contribution, justify spend on people practice, continuously improve people practice activities, identify further needs, identify gaps, enable informed business decisions.

Methods: for example cost-benefit analysis, evaluation, validation, ROI, ROE. Models of evaluation; evaluation methods, determining evaluation scope and criteria; types of information and evidence for evaluation; evaluation tools (for example staff satisfaction surveys, absence data, well-being).

Learning resources

Books

Beevers, K., Hayden, D. and Rea, A. (2019) *Learning and development in the workplace*. 4th ed. London: CIPD Kogan Page.

Fink, A. (2019) *Conducting research literature reviews: from the internet to paper*. 5th ed. London: Sage.

Gambles, I. (2009) *Making the business case: proposals that succeed for projects that work*. Farnham: Gower.

Horn, R. (2009) *The business skills handbook*. London: CIPD Kogan Page.

Phelps, B. (2004) *Smart business metrics: measure what really counts ... and manage what makes the difference*. Harlow: Pearson Education.

Key journals

Human Resources

Available at: www.hrmagazine.co.uk/

People Management

Available at:

www.peoplemanagement.co.uk

Personnel Today

Available at: www.personneltoday.com/

Online resources

CIPD. (2011) *Using metrics to drive value through people* [podcast]. London: Chartered Institute of Personnel and Development. Available at: www.cipd.co.uk/podcasts/using-metrics-drive-value-through-people

CIPD. (2016) *How to write a critical review. Study guide*. London: Chartered Institute of Personnel and Development. Available at: www.cipd.co.uk/knowledge/study-guides/critical-review-writing

CIPD. (2019) *Critical thinking* [podcast]. London: Chartered Institute of Personnel and Development. Available at: www.cipd.co.uk/podcasts/critical-thinking

CIPD. (2019) *Evidence-based practice for HR: beyond fads and fiction* [podcast]. London: Chartered Institute of Personnel and Development. Available at: www.cipd.co.uk/podcasts/evidence-based-hr

Hayden, D. (2019) *Costing and benchmarking learning and development*. Factsheet. London: Chartered Institute of Personnel and Development. Available at: www.cipd.co.uk/knowledge/strategy/development/benchmarking-factsheet

Hill, S. and Houghton, E. (2018) *Getting started with people analytics: a practitioner's guide*. Guide. London: Chartered Institute of Personnel and Development. Available at: www.cipd.co.uk/knowledge/strategy/analytics/practitioner-guide

Houghton, E. (2020) *People analytics*. Factsheet. London: Chartered Institute of Personnel and Development. Available at: www.cipd.co.uk/knowledge/strategy/analytics/factsheet

Young, J. (2019) *Evidence-based practice for effective decision-making*. Factsheet. London: Chartered Institute of Personnel and Development. Available at: www.cipd.co.uk/knowledge/strategy/analytics/evidence-based-practice-factsheet

Websites

www.cipd.co.uk

Website of the Chartered Institute of Personnel and Development

www.cebma.org/

Website of the Center for Evidence-Based Management (CEBMA)

5CO03

Professional behaviours and valuing people



About this unit

This unit focuses on how applying core professional behaviours such as ethical practice, courage and inclusivity can build positive working relationships and support employee voice and well-being. It considers how developing and mastering new professional behaviours and practice can impact performance.

What you will learn

You will explore professional and ethical behaviours in the context of people practice by appraising what it means to be a people professional, how personal and ethical values can be applied, including contributing to discussions with confidence and conviction to influence others. You will learn how to champion inclusive and collaborative strategies, arguing the human and business benefits of inclusive behaviours and the right to be fairly treated at work. Additionally, you will design and evaluate solutions aimed at building positive working relationships. Finally, you will demonstrate personal commitment to learning, professional development and performance improvement by exploring how the role of a people professional is evolving. You will also assess your own strengths, weaknesses and development areas and formulate a range of CPD activities to support your learning journey.

5 credits

Level 5

50 hours total unit time
20 guided learning hours

Learning outcome, assessment criteria and indicative content

1 Be able to demonstrate professional and ethical behaviours, in the context of people practice.

1.1 Appraise what it means to be a people professional.

Definition of professional; professional specifications and frameworks, professional requirements, CIPD Profession Map, professional values, personal values (for example fairness, honesty, equality, inclusivity, valuing others, evidence-based decision making); concept of 'professional integrity'.

1.2 Recognise how personal and ethical values can be applied in the context of people practice.

The importance of knowing one's own personal values and using these as a framework for behaviour and practice. Knowing how personal values integrate (or not) with organisational and/or professional values and if/how differences can be reconciled. Recognising how personal values and beliefs shape ways of working and work relationships – and the impact of this for colleagues. Demonstrating professional courage – speaking up for ethical standpoints within the workplace and supporting others to do the same. The influences of cultural differences and expectations.

1.3 Contribute confidently to discussions in a clear, engaging and informed way to influence others.

Contribution to discussions: the need for people professionals to be well informed and courageous in speaking up and making their contribution so that people practice expertise is applied and HR/L&D/OD purpose is fulfilled; the HR/L&D/OD purpose and value for organisations and for workers (for example as defined by the CIPD ('champions better

work and working lives' and 'improves practices in people and organisation development to ensure that work benefits individuals, businesses, economies and society'); the different specialist and generalist contributions (for example as defined by the CIPD Profession Map).

How to engage: influence in oral communication: effective communication styles (for example using volume, tone and pace; gaining attention; using listening skills; adapting content to audience; skills of summarising and precis; presentation skills; making an evidence-based argument).

1.4 Reflect how you have taken responsibility for your work/actions, including recognising and rectifying mistakes.

Taking responsibility: ongoing review and taking responsibility for own work, for example knowing and clarifying work requirements and responsibility levels, being clear about ethics and values, ensuring own capability to meet requirements, time management and completing work within agreed timescales, checking quality of work, confirming client/recipient satisfaction with work done.

Recognising and rectifying mistakes: taking responsibility for mistakes, for example recognising, admitting, acknowledging mistakes; identifying options to correct, mitigate or 'compensate' for mistakes; agreeing and taking best course of action; learning from mistakes. Cultural issues of face-saving and techniques for apologising.

1.5 Recognise when and how you would raise matters which conflict with ethical values or legislation.

When and how to raise issues, for example organisational policies and practices, organisational leadership style, personal relationships, conflict style. Examples of 'matters which conflict', for

example with legal matters, with ethical values, with personal values. Concept of 'whistleblowing', high-profile examples.

2 Be able to champion inclusive and collaborative strategies for building positive working relationships.

2.1 Argue the human and business benefits of people feeling included, valued, and fairly treated at work linking to related theory.

Human and business benefits: for example job satisfaction, reduced dispute and conflict, corporate reputation; enhanced worker well-being, increased retention and reduced turnover rates, reduced sickness, increased efficiency and effectiveness of work.

Relevant theory: theorists and thinkers, for example Maslow, McLelland, Daniel Pink, David Rock; concepts of 'worker engagement' and 'worker well-being'.

2.2 Design an impactful solution based on feedback and engagement with others.

Solution relating to any people practice discipline which has been arrived at following feedback and engagement with others.

Others: for example those directly impacted by the solution, those with relative insights or contributions to offer, partners in joint working, those with authority or responsibility in the area concerned (for example in determining, designing or delivering the solution).

Feedback and engagement: informal or formal feedback; engagement via, for example discussions, email and documentary exchanges, research or consultation activities.

2.3 Evaluate the impact of the solution to influence and engage people within an organisation.

Principles of evaluating impact and areas that impact might be found in the solution. Evaluating the extent to which the objective has been met using the original success criteria. Potential of the proposed solution, for example change opinion, gain acceptance of change, build commitment to change, drive change, engender engagement rather than simple 'compliance'. Extent to which the solution recognises and embraces different needs and agendas. Different ways solutions can be 'marketed' to engender engagement and emphasise positive impact.

2.4 Reflect on your own approach to working inclusively and building positive working relationships with others.

Approaches, for example valuing people as individuals and recognising the value and benefits of diversity; actively seeking and listening to diverse views and opinions; building trust and providing appropriate support when needed; finding opportunities to collaborate with wider colleagues; sharing knowledge and expertise to solve problems.

3 Be able to demonstrate personal commitment to learning, professional development and performance improvement.

3.1 Explore how the role of a people professional is evolving and the implications this has for continuing professional development.

Emerging knowledge and skills required and the implications for CPD, for example business acumen, technology savvy, specialist expertise, work skills, collaborative working skills, remote

Learning outcome, assessment criteria and indicative content

working/working from home, self-management, communication skills.

3.2 Assess your strengths, weaknesses and development areas based on self-assessment and feedback from others.

People and contexts for gaining feedback, formal and informal feedback, regular and ad hoc feedback, feedback methods and media, feedback as incoming information, triangulation of received feedback, relevance and importance of feedback, how to structure feedback, self-assessment methods and relevant frameworks to assess against. Bias issues in self-assessment and others' feedback. Utilising the CIPD Profession Map.

3.3 Formulate a range of formal and/or informal continuing professional development (CPD) activities to support your learning journey.

CPD models and theory, CIPD and other sector and professional requirements for CPD, for example formal and informal, self-directed learning, coaching, mentoring, work, applying learning as appropriate, shadowing, skills practice, investigation and research, reading, blogs, webcasts, videos, social media discussions and forums, conferences, training courses, on-job and off-job learning, characteristics of a good-practice CPD plan, how to complete a CPD plan.

3.4 Reflect on the impact of your continuing professional development activities on own behaviour and performance.

Concept and theory of reflective practice, outputs of reflection (records? plans?), evaluating/measuring behaviour changes, evaluating/measuring performance changes, checking changes are positive and meet intended outcomes, impact on own performance and behaviour.

Books

Beevers, K., Hayden, D. and Rea, A. (2019) *Learning and development in the workplace*. 4th ed. London: CIPD Kogan Page.

Frost, S. and Kalman, D. (2016) *Inclusive talent management: how business can thrive in an age of diversity*. London: Kogan Page.

Martin, M. and Whiting, F. (2016) *Human resource practice*. 7th ed. London: CIPD Kogan Page. (Forthcoming, 8th ed., August 2020.)

Pink, D. (2018) *Drive: the surprising truth about what motivates us*. Edinburgh: Canongate Books.

Key journals

Human Resources

Available at: www.hrmagazine.co.uk/

People Management

Available at:

www.peoplemanagement.co.uk

Personnel Today

Available at: www.personneltoday.com/

Online resources

Department for Business, Innovation & Skills and Government Equalities Office. (2013) *The business case for equality and diversity: a survey of the academic literature*. BIS Occasional Paper No.4. London: The Department. Available at: www.gov.uk/government/publications/the-business-case-for-equality-and-diversity-a-survey-of-the-academic-literature

Gifford, J. (2019) *Employee engagement and motivation*. Factsheet. London: Chartered Institute of Personnel and Development. Available at: www.cipd.co.uk/knowledge/fundamentals/relations/engagement/factsheet

Websites

www.cipd.co.uk/knowledge/culture/ethics
Website of the Chartered Institute of Personnel and Development and part of the Knowledge Hub, offering a range of resources about ethics

www.cipd.co.uk/knowledge/fundamentals/relations/diversity

Website of the Chartered Institute of Personnel and Development and part of the Knowledge Hub, offering a range of resources about diversity and inclusion

<https://peopleprofession.cipd.org/learning>

Website of the Chartered Institute of Personnel and Development, offering free online courses to members on the eight core behaviours of the Profession Map, including ethical practice, professional courage and influence, valuing people and working inclusively

5LD01

Supporting self-directed and social learning



About this unit

This unit is about recognising how individuals are increasingly wanting to learn at their own pace, by their preferred method, and in a way that fits with their personal schedules and lifestyle. Moreover, effective organisational learning embraces formal and informal socialised activities. These shifts, and the greater recognition of the benefits in driving performance through learning, means that learning and development professionals must facilitate approaches for those who learn in these ways.

What you will learn

You will learn about the concepts of, and connections between, self-directed and social learning and the underpinning theories, including evaluating the benefits and risks. You will also explain steps that organisations take to encourage learning and how digital and technological innovations encourage and enable self-directed learning. Additionally, you will be able to support learning through the curation of learning resources, including developing guidance that encourages and supports learners.

6 credits

60 hours total unit time
25 guided learning hours

Level 5

1 Understand theoretical concepts of self-directed and social learning.

1.1 Explain the concepts of, and connections between self-directed and social learning.

Concept: definitions and interpretations, related concepts (for example collaborative, collective, co-operative learning). Related theories and models (for example for self-directed learning, Deci and Ryan, Knowles, Hase and Kenyon and Grow, and for social learning, Bandura, Vygotsky and Bruner, Siemens and Downes, Stepper).

Connections: for example how terminology is often unclear and used interchangeably, or to mean different things, for example, 'individual learning' might be directed or self-directed 'solo' learning. Self-directed learning might include collaborative learning activities determined by the individual learners.

1.2 Assess underpinning theories related to self-directed and social learning.

Self-directed learning: related theory and models that underpin learner choice in informal and self-directed learning. for example Deci and Ryan, Knowles, Hase and Kenyon, Jennings, Sambrook, Willis, Davachi et al, and examples of formal (planned, deliberate) and informal (accidental, naturally occurring) types of learning.

Social learning: related theory and models that underpin social learning, for example Bruner, Lave and Wenger, Vygotsky, Revans, Jarcho, Hart and Lancaster.

1.3 Evaluate the potential benefits and risks of self-directed and social learning for both individuals and organisations.

Potential benefits: empowering employees, learner self-awareness and self-reliance; greater individualisation of learning; potential for greater targeting of development activities in relation to unique learning needs; potential for wider awareness, sharing, signposting of development opportunities; learning accessed just-in-time, in-the-flow of work and as needed, potential increase in overall organisation knowledge; benefits of communities of practice; more agile employees and organisations; potential for increased worker satisfaction and engagement; more effective formal learning and development in the organisation through blended options; support the transfer of learning to the workplace.

Potential risks: non-engagement; cognitive learning not utilised or developed into skills or behaviour change; lone learners and lack of stimulation from others; challenges of less support; lack of networking opportunities; failure to recognise 'mistakes' in learning or reinforce poor practice; lack of alignment between individual choices and organisation requirements; lack of focus; 'group think'; challenges of dispersed workforces.

2 Understand how to encourage and engage individuals in self-directed and social learning and development activities.

2.1 Explain the steps organisations can take to encourage informal and self-directed learning.

'Staged self-directed learning model' (Grow); insights from psychology and neuroscience; adult learning and motivation theory; provision of options

Learning outcome, assessment criteria and indicative content

rather than predefined solutions; facilitation rather than instruction; financial and resource support; promoting a learning culture; promoting the value of self-directed learning; challenging and overcoming reasons for non-engagement: for example self-image, self-beliefs and learning history; perceived lack of relevance to work and/or work aspirations; perceived lack of relevance to personal objectives; logistical factors.

2.2 Explain the steps organisations can take to encourage social learning.

Forming communities of practice; provision of effective environments, face-to-face and digital; support, for example community management; promoting benefits; resourcing through content; promote concept of 'working out loud'; interacting with 'adjacent/linked' professional communities; differentiating between social learning and social media; insights from psychology and neuroscience, adult learning and motivation theory, financial support, promoting a learning culture, challenging and overcoming reasons for non-engagement: for example self-image, self-beliefs and learning history; perceived lack of relevance to work and/or work aspirations; perceived lack of relevance to personal objectives; logistical factors.

2.3 Critically assess theories of learner differences in relation to ways of accessing and undertaking self-directed and social learning.

The validity and relevance of learning styles; generational categories and stereotypes; for example Baby Boomers, Generation X, Y, Z, Millennials; perceived generational differences in relation to expectations of work, preferred learning methods; how learning is integrated into work and life; expertise in, expectations of and availability and challenges of technology; expectations of networking (social learning).

2.4 Assess how digital and technological innovation are encouraging and enabling self-directed and social learning.

Impact of smart devices; social media and learning networks, for example Twitter, LinkedIn, Facebook, Instagram, YouTube; communities of practice; development of a 'communication culture'; online content; augmented and virtual reality, artificial intelligence and the role of L&D professional as a social learning practitioner.

2.5 Discuss strategies for supporting individuals to reflect on and measure the impact of self-directed and social learning.

Strategies and support such as regular meetings and discussions with coaches, mentors and line managers; provision of self-assessment tools. Reflection and measurement, such as the principles of critical self-reflection, for example Driscoll, Gibbs, Rolfe et al; differences between reflective and reflexive practice; personal goal-setting and self-assessment, linking into other formal or informal L&D activities where impact and transfer assessment takes place; collecting peer or other feedback, links to 'performance conversations' with the line manager; internal and external reward.

3 Be able to support self-directed and social learning through the curation of learning resources.

3.1 Evaluate principles underpinning the curation of learning resources for self-directed and social learning, either as part of a wider learning and development programme or as a 'stand-alone' resource.

Structure and approach to curation; factors influencing the selection of materials, for example relevance to purpose, quality,

engagement, ease of access, cognitive and professional level; recognition that resources don't have to be created; use/collate from a huge amount of existing materials and information available; factors influencing access (selected platform or distribution method, user access skills and/or permissions); difference between central L&D-curated versus learner-curated; use of subject-matter experts; curation models; Jarcho's 'seek, sense, share' model, Higgins' 'digital curation, lifestyle' model, Lancaster's 'CURATE' model.

for example code of conduct; updating, archiving and disposing of resources; L&D's potential role in curation oversight

3.2 Curate a range of accessible learning resources in relation to a specific area of learning using an appropriate platform/method to make them accessible to others.

Defining accessibility needs of learners in a given context; types, strengths and weaknesses of different curated resource types, text, video (including recorded webinars), audio (podcast), interactive resources/e-learning, articles, photos, signposting to references, good practice, case studies, blogs, social media; choice of platforms and/or methods: use of intranets, LMS/LXP/CPD systems, online collative tools, HR systems, e-portfolio, apps, email, social media, artificial intelligence.

3.3 Develop guidance which encourages and supports learners to be the curators of resources for one another.

Encourage learners to curate their own materials by providing guidance and examples; emphasise benefits, for example access to different perspectives and wider range of materials; risks, information may lack accuracy, currency – resources maybe outdated, offensive content; need for guidelines on storage (use of a taxonomy and effective tagging), copyright and intellectual property; role of subject experts; adequate systems access and training; links to organisation policies,

Learning resources

Books

Beevers, K., Hayden, D. and Rea, A. (2019) *Learning and development practice in the workplace*. 4th ed. London: CIPD Kogan Page.

Bingham, T. and Conner, M. (2015) *The new social learning: connect, collaborate, work*. 2nd ed. Alexandria, VA: ATD Press.

Doloriert, C., Boulton, W. and Sambrook, S. (2017) *Facilitating collective and social learning*. E-book. London: CIPD Kogan Page.

Hart, J. (2020) Modern workplace learning: how to build a continuous learning culture. modernworkplacelearning.com.

Hart, J. and Jarcho, H. (2014) *Social learning handbook: the next generation of learning practices in the age of knowledge sharing and collaboration*. London: Centre for Learning & Performance Technologies.

Illeris, K. (2011) *The fundamentals of workplace learning: understanding how people learn in working life*. Abingdon: Routledge.

Stewart, J. and Cureton, P. (2014) *Designing, delivering and evaluating L&D: essentials for practice*. London: CIPD Kogan Page.

Key journals

People Management

Available at:

www.peoplemanagement.co.uk/

TD: Talent Development

Available at:

www.cipd.co.uk/knowledge/journals

Websites

www.td.org/

Website of the Association for Talent Development (ATD), formerly ASTD, the American association concerned with developing talent in organisations

5LD02

Learning and development design to create value



About this unit

This unit considers the relationship between the learning and development needs of individuals and organisational objectives. It focuses on the elements of theoretical and contextual learning design in facilitating impactful learning experiences that support performance and productivity.

What you will learn

You will learn about the different factors that need to be considered when designing learning and development, including programmes for dispersed workforces and how inclusivity and accessibility can be built into the design stage. You will establish learning and development needs, evaluating methods for identifying organisational needs and key principles. You will conduct stakeholder analysis in relation to learning and development activity and convert relevant information into clearly stated learning and development objectives. Finally, you will design engaging learning and development solutions to address identified objectives.

Level 5

6 credits

60 hours total unit time
25 guided learning hours

Learning outcome, assessment criteria and indicative content

1 Understand the legal, cultural, logistical, financial and learner factors to be considered when designing learning and development.

1.1 Explore key factors to be considered when designing learning and development activities.

Legal – health, safety and welfare, data protection and professional compliance; cultural – expectations, organisational, team, local and national differences; logistics – working schedules, resource and system availability, limitations of delivery method, knowledge and understanding of the deliverer, travel; financial – budgets, design and delivery costs and hidden costs; learner – unique contexts, personal motivation and support, right time for the learner, personal blockers and inhibitors, level of and speed of learning required; performance needs – access, inclusion and diversity factors, line manager and team support, existing knowledge, skills and behaviour, reflection and application; models and theories – learner-centred learning design and constructivism, for example Shackleton-Jones, Jonassen; neuroscience, for example Collins, Davachi et al, Willis.

1.2 Assess factors to consider when designing learning and development programmes for dispersed workforces.

Balance of responsibility between central and local L&D teams; programme design, for example collaborative versus solo, individual versus group; consistency of programmes across geographies; language issues and barriers; logistics of international time zones and travel implications; technology implications and impact measurement approaches. Different international legal systems and their implications, localisation of programme design and content, cultural

norms and expectations. Financial implications for different design and delivery solutions. Models and theories, for example Sole and Edmondson.

1.3 Explain how inclusivity and accessibility can be built into learning and development at design stage.

Awareness and sensitivity to cultural norms and practices and their potential impact on the selection of delivery methods, resources, materials, etc. Consider choice and complexity of language and terminology, potential barriers due to technological issues and for non-native speakers, and learner understanding. Differentiation of activities and resources (for example format, media, display) in relation to different learner levels, needs and work contexts. Ensure L&D practitioners apply principles in accessibility and inclusion in design activities.

2 Be able to establish learning and development needs in relation to organisational objectives.

2.1 Evaluate methods for identifying organisational learning needs and key principles.

Gap analysis, future state analysis, environmental analysis tools, financial/KPI review, job analysis, skills audits, survey, observations, assessments, performance review, performance consulting conversations, interviews, questionnaires, evaluation data, customer/other feedback.

2.2 Conduct key stakeholder analysis to identify areas of need in relation to learning and development activity.

Stakeholder analysis and area of interest: models and diagnostics, stakeholder mapping, power/influence models (for example Mendelow).

2.3 Convert relevant information from the stakeholder analysis into clearly stated learning and development objectives.

Conversion into L&D objectives: models and theories of objective-setting (for example consideration of Mager, Bloom's taxonomy), aims, objectives and learning outcomes; connections between learning objectives and evaluation and impact criteria.

2.4 Assess how individual and team learning and development objectives align to organisational or departmental strategy.

Organisational and departmental objectives such as learning needs; wider requirements such as: legal requirements, financial and resource constraints, time/location flexibility, potential impact on other work areas, potential impact on different teams or team members, alignment such as with other L&D and people practice initiatives, current skill and knowledge levels, particular needs and preferences, welfare issues, diversity and equality.

3 Be able to design engaging learning and development solutions underpinned by learning theory that address identified objectives.

3.1 Assess how aspects of learning-related theory, psychology and neuroscience influence approaches to the design of learning and development.

Adult learning and motivation theories, for example behaviourist, cognitive, constructivist and social constructivist theories; application of neuroscience, for example spacing and sequencing, managing attention and engagement, cognitive overload, concept of neuroplasticity, for example Collins, Davachi et al, Willis, critical evaluation of

neuroscience; risks and challenges now impacting some popular theories and models.

3.2 Discuss a range of learning and development delivery methods and how they can be blended together to form an engaging and effective learning and development solution.

Critical application of face-to-face, technology-based, coaching and mentoring, individual learning, social learning, on- and off-job and in-the-flow of work, apprenticeships; definition and concepts of blended learning, bite-size and microlearning, flipped classroom; considerations involved in blending activities, for example sequencing and combining learning content, preferences for blending different activities, gauging time requirements, resource implications, best fit with workplace factors. Formats for specifying L&D activities/programmes.

3.3 Design a learning and development solution which addresses and combines identified learning and development objectives:

- **learning methods**
- **engagement techniques**
- **impact measurement activities.**

Learning methods: as above (3.2). Engagement techniques: for example involving learners at all and different stages of the learning process, embracing learner ownership, recognising and addressing obstacles and resistance, building choice into activities, effective sequencing and spacing, creative and inclusive use of multimedia learning resources; use of stories, narratives and activities which generate emotional responses, positioning of methods and activities to generate attention. Creating an inclusive learning environment. Engaging learners through effective joining instructions, flipped classroom techniques to build interest, clear linking of learning to workplace and work/personal benefits, and

Learning outcome, assessment criteria and indicative content

application of learner-centred design and neuroscience.

Impact measurement: Kirkpatrick, Katzell, Brinkerhoff's success case method, LTEM and Weinbauer-Heidel and Ibeschitz-Manderbach. Importance of, and rationale for, full consideration of evaluation and impact at design stage, determining scope of evaluation, evaluation approaches and methods, evaluation of relevant data and insights (quantitative and qualitative) and timings of evaluation.

Books

Beevers, K., Hayden, D. and Rea, A. (2019) *Learning and development practice in the workplace*. 4th ed. London: CIPD Kogan Page.

Hase, S. and Kenyon, C. (eds) (2013) *Self-determined learning: heutagogy in action*. London: Bloomsbury Academic.

Knowles, M.S. (1980) *The modern practice of adult education: from pedagogy to andragogy*. New York: Association Press.

Stewart, J. and Cureton, P. (2014) *Designing, delivering and evaluating L&D: essentials for practice*. London: CIPD Kogan Page.

Key journals

People Management

Available at:

www.peoplemanagement.co.uk/

TD: Talent Development

Available at:

www.cipd.co.uk/knowledge/journals

Online resources

Ahmetaj, G. and Daly, J. (2018) *Driving performance and productivity: why learning organisations propel and sustain more impact*. In-Focus report. London: Towards Maturity CIC. Available at:

www.cipd.co.uk/knowledge/strategy/development/performance-productivity

CIPD. (2015) *Aligning L&D with business objectives and emerging practices [podcast]*. London: Chartered Institute of Personnel and Development. Available at: www.cipd.co.uk/podcasts/aligning-learning-development-with-business-objectives

CIPD. (2018). *Driving performance with L&D. [podcast]*. London: Chartered Institute of Personnel and Development. Available at: www.cipd.co.uk/podcasts/driving-performance-ld

Hayden, D. (2019) *Learning and development evolving practice*. Factsheet. London: Chartered Institute of Personnel and Development. Available at: www.cipd.co.uk/knowledge/strategy/development/evolving-practice-factsheet

Hayden, D. (2020) *Learning and development strategy and policy*. Factsheet. London: Chartered Institute of Personnel and Development. Available at: www.cipd.co.uk/knowledge/strategy/development/factsheet

Loon, M. (2014) *L&D: new challenges, new approaches*. Research report. London: Chartered Institute for Personnel and Development. Available at: www.cipd.co.uk/knowledge/strategy/development/challenges-approaches-report

Websites

www.cipd.co.uk/knowledge

Website of the Chartered Institute of Personnel and Development and link to the CIPD's Knowledge Hub, providing resources on 15 key topics in HR and L&D, including factsheets, research reports, guides, survey reports and more, as well as online journals and the HR and L&D Database

www.td.org/

Website of the Association for Talent Development (ATD), formerly ASTD, the American association concerned with developing talent in organisations

5LD03

Facilitate personalised and performance focused learning



About this unit

This unit focuses on the effective facilitation of learning activities that have an impact. This includes knowing how to prepare an impactful intervention, making effective use of pre-learning activities and personalisation to create learning that can be transferred back into the organisational context. In addition, it explores facilitation techniques, whether face-to-face or online, and the principles and ethics that underpin the delivery of an outstanding learning experience.

What you will learn

You will develop a range of personalised, accessible learning resources evaluating internal and external factors as part of your preparation. You will discuss the concept of facilitation and facilitation techniques to support learning and will demonstrate techniques for monitoring the effectiveness of learning activities, differentiating these according to the needs of learners. You will explore ethical factors involved in the facilitation of learning and will deliver an inclusive learning activity that meets objectives. Finally, you will explain the concept of 'transfer of learning' and evaluate the role of line managers in supporting this.

Level 5

6 credits

60 hours total unit time
25 guided learning hours

1 Be able to prepare for an engaging and impactful learning and development activity.

1.1 Evaluate internal and external factors to consider as part of preparation for learning and development activities.

Preparation factors: preparing learners using links to adult learning theory, processes for initial learner engagement. Communication and partnering with the business to ensure learner preparation and engagement prior to an L&D activity. Effective and enhanced approaches to 'joining instructions'.

Preparing resources: for example preparing the space for effective learning, physical and technical equipment, technology, people, health, safety and well-being factors.

Own professional readiness: for example rationale for undertaking the proposed learning (desirable vs mandatory) and associated motivations, own sufficiency of L&D skills and experience, subject knowledge, familiarisation with material, managing own emotional state, insights into the learners and their context.

Pre-learning: theories, models and example of pre-learning, for example concept of a flipped classroom. Building skills that underpin and enhance learning.

1.2 Prepare a range of personalised, accessible learning resources to enhance learning.

Accessibility considerations in the choice of resources, resource types; audio visual/presentation software, flipchart, practice equipment, display objects, handouts, case studies, exercises and materials, workbooks, digital resources – videos, podcasts, animations, infographics, curated content, technology-based engagement and survey tools. Learner-

generated content and resources.

Strategies for differentiating the choice and use of resources.

2 Be able to deliver a learning and development activity using effective and inclusive facilitation methods.

2.1 Discuss the concept of facilitation and facilitation techniques that can be applied to support learning.

Digital or face-to-face concepts and models of facilitation, different types and purposes of facilitation (for example learning activity, team building); locus of control and balance of responsibility (from instructor through coach/mentor to facilitator) for learning and the learning process. Moving the delivery approach from instructor/presenter to facilitator.

Techniques: for example formulating ways of working (for example ground rules) with the learners, using appropriate initial engagement activities, for example ice-breakers and warm-ups, explaining, questioning, presenting, demonstrating, facilitating learner activities (for example exercises, case studies, discussions), facilitating skills development (for example demonstration, supported practice, role play), facilitating pair, team, group or learner-led activities; techniques and methods for opening and closing a learning session. Encouraging and supporting learners to maximise their own learning within the group.

2.2 Demonstrate techniques for monitoring the effectiveness of learning activities, including making adjustments to meet the needs of individual learners within a group context.

Models of group behaviour, techniques for managing group dynamics, techniques for monitoring group and individual learning (for example informal questioning, observation, assessment activities,

Learning outcome, assessment criteria and indicative content

performance in learning activities and group work), balancing individual and group needs, differentiation, reasonable adjustments and adaptation of learning activities.

2.3 Explore the ethical factors involved in facilitation of learning.

Power dynamics in facilitator-learner relationship, ability to influence through language and actions, objectivity, neutrality and balance, psychology of learning. Concepts of bias: unconscious bias, cultural bias (on part of facilitator, on part of group members) and how these can impact facilitated learning. Ethical use of learning resources, critical evaluation of the use of the psychology-based 'tests' and personality or learner assessments (for example learning styles, MBTI). Importance of establishing the validity of resources and approaches before use and presenting to learners.

2.4 Deliver or facilitate an inclusive learning and development activity using resources that meet objectives.

Identification of learning objectives, selection of delivery method, design and preparation for delivery, checking inclusivity considering bias in materials and resources, for example racial, gender stereotyping; cultural bias; personal characteristics; examples of how poorly designed materials can exclude or alienate learners; considering unique learner needs and challenges. Strategies for checking materials against bias.

3 Understand strategies which support the transfer of learning to the workplace.

3.1 Explain the concept of 'transfer of learning' and its significance in workplace learning.

Starting with the organisational context, opportunity or need; thinkers and models, for example Kirkpatrick, Katzell, Brinkerhoff's success case method, LTEM and Weinbauer-Heidel and Ibeschitz-Manderbach. Debates around 'learning for learning's sake' versus learning to improve performance, knowledge, skills or behaviour. Organisational need for learning to support performance and the relative merits and impact of learning away from the workplace and in-the-flow of work. The impact of unique learner needs on chosen approaches and their effectiveness.

3.2 Critically assess strategies for supporting the transfer of learning from learning and development activities to the workplace.

The importance of ensuring effective learning during/from activities; types of strategy, both positive and negative, for example punitive or supportive; transfer strategies, for example follow-on action planning within programme; work-based projects started within programme and taken forward; action learning sets; curated materials; socialised groups; appropriately spaced follow-up L&D activities; follow-up resources; formally designed line manager involvement; work-based coaching; ongoing reviews; work-based assessment; facilities, support and encouragement for informal learning and knowledge-sharing.

3.3 Evaluate the role of line managers in supporting transfer of learning for their team members, and how learning and development can support them in this.

Involvement in programme design including personal and team goal-setting, 'follow-up' activities; involvement in programme delivery (as subject specialist, contributor, presenter, other); providing pre- and post-programme coaching, performance review or work-based assessment; contributing to curation of resources; encouraging informal learning amongst team members; regular reviewing and extending action plans. Line manager support, for example one-to-one coaching, provision of resources and ongoing support; support groups or manager-based action learning sets; online support (for example updates, newsletters, forums, short online just-in-time training, as needed).

Learning resources

Books

Beevers, K., Hayden, D. and Rea, A (2019) *Learning and development practice in the workplace*. 4th ed. London: CIPD Kogan Page.

Stewart, J. and Cureton, P. (2014) *Designing, delivering and evaluating L&D: essentials for practice*. London: CIPD Kogan Page.

Schwarz, R (2017) *The skilled facilitator: a comprehensive resource for consultants, facilitators, coaches, and trainers*. 3rd ed. Hoboken, NJ: John Wiley & Sons.

Online resources

McBrown, J. (2018) *What are facilitation skills and how do you facilitate?* Web article. Horsham: Roffey Park Institute. Available at: www.roffeypark.com/learning-and-facilitation/what-are-facilitation-skills-and-how-do-you-facilitate/

Mind Tools. (n.d.) *The role of a facilitator: guiding an event through to a successful conclusion*. Web article. Horsham: Mind Tools. Available at: www.mindtools.com/pages/article/RoleofAFacilitator.htm

Websites

www.iaf-world.org/site/
Website of the International Association of Facilitators

www.td.org/talent-development-glossary-terms/what-is-facilitation
Website of the Association for Talent Development (ATD), formerly ASTD, the American association concerned with developing talent in organisations

5OS01

Specialist employment law



About this unit

This unit considers key areas of employment legislation and its legal framework, focusing on how people professionals are obliged to take account of legal requirements in different jurisdictions when carrying out the varied aspects of their role.

What you will learn

You will learn about the purpose of employment regulation and the way that it is enforced in practice. You will evaluate the aims and objectives, the role played by the tribunal and courts in enforcing employment law and how cases are settled before and after legal procedures. You will explain the main principles of discrimination law, how to manage recruitment and selection activities lawfully as well as learning about redundancy law and changes in contracts. Finally, you will learn about managing issues relating to pay and working time in a lawful way and employment rights for flexible working.

6 credits

60 hours total unit time
25 guided learning hours

Level 5

1 Understand the purpose of employment regulation and the way it is enforced in practice.

1.1 Evaluate the aims and objectives of employment regulation.

The role of employment law in helping to achieve social justice, inclusion and fairness in the workplace; economic arguments in favour of increased regulation: protects against unjust, inequitable and negligent acts, slavery, discrimination, child labour. Awareness of negative arguments for employment regulation, such as legislation too complex, not a deterrent, poorly drafted, harder to create jobs; groups who support or oppose greater regulation.

1.2 Examine the role played by the tribunal and courts system in enforcing employment law.

The role played by courts and institutions with jurisdiction to hear employment-related matters and make and enforce employment law; hierarchy of the courts; Employment Tribunal, Employment Appeal Tribunal, Court of Appeal, Supreme Court, European Court of Justice, County Court, High Court; role of appeal courts.

1.3 Explain how cases are settled before and during formal legal procedures.

Procedures for settling cases and the employment tribunal system – role of ACAS and use of COT3 (GB) or Labour Relations Agency (NI) or Workplace Relations Commission (ROI) in early conciliation; process of discussion and negotiation; key features of settlement agreements; terms that may be included in settlement agreements such as financial settlement, a reference; need for written settlement agreement; importance of voluntary process; meaning of ‘without prejudice’; importance of independent legal advice.

2 Understand how to manage recruitment and selection activities lawfully.

2.1 Evaluate the principles of discrimination law in recruitment, selection and employment.

The principles of discrimination law including how they affect recruitment and selection activities; protected characteristics, direct and indirect discrimination, harassment related to a protected characteristic, sexual harassment, less favourable treatment for rejecting submitting to unwanted conduct, significance of ‘purpose or effect’ and victimisation, discrimination by association, discrimination by perception; discrimination arising from disability, reasonable adjustments; defences; use of comparators; remedies; relevant cases.

2.2 Discuss the legal requirements of equal pay.

The principles of equal pay; defences to equal pay claims; remedies; relevant cases; conducting equal pay reviews to ensure compliance.

3 Understand how to manage change and reorganisation lawfully.

3.1 Discuss the legal implications of managing change.

Lawful processes for changing; process for consultation and gaining agreement for change, change unilaterally, dismiss and re-engage; vary through collective bargaining; risks associated with varying contracts such as breach of contract, constructive dismissal, ‘stand and sue’, discrimination; contractual issues in the management of change; flexibility clauses. The principles of the law in the areas of redundancy; definitions of redundancy;

entitlement to statutory redundancy pay, individual and collective consultation rights; other statutory rights such as notice and holiday; selection pools; points systems vs selection systems; discrimination risks; relevant cases.

3.2 Explain the legal requirements relating to transfers of undertakings.

Main provisions of relevant legislation, for example Transfer of Undertakings Protection of Employment Regulations, including what is relevant transfer, need to provide employee liability information, rights of affected individuals to information and consultation; remedies if legislation is breached, relevant cases.

4 Understand how to manage issues relating to pay and working time lawfully.

4.1 Explain the major statutory rights workers have in relation to pay.

Laws regulating the payment of wages and salaries; national minimum wages. Statutory rates of pay; rights to itemised pay statements. Links with equal pay, working time, sickness, etc.

4.2 Explain the major statutory rights in leave and working time.

The working time legislation and minimum annual leave entitlements, for example Working Time Regulations; provisions that relate to maximum working hours, in-work rest periods, rest period between periods of work, annual leave; how to calculate pay when on annual leave; reference periods, provisions for night workers; sickness (short and long term); differences for young adults; remedies; relevant cases.

4.3 Explain the main principles of maternity, paternity and adoption rights in the context of employment rights.

Rights to leave and pay during maternity, time off for antenatal care, paternity or adoption leave; shared parental leave and pay; keeping in touch days (KIT and SPLIT); qualifying periods of service.

4.4 Explain other employment rights relating to flexible working.

Rights to paid and unpaid time off during working hours; shift, weekend and bank holiday working; qualifying service; the rights to request flexible working for example on religious grounds, because of caring responsibilities; reasons flexible working requests can be refused, remedies.

Learning resources

Books

- Cushway, B. (2017) *The employer's handbook: an essential guide to employment law, personnel policies and procedures*. 13th ed. London: Kogan Page.
- Daniels, K. (2019) *Introduction to employment law: fundamentals for HR and business students*. 5th ed. London: CIPD Kogan Page.
- Honeyball, S. (2016) *Honeyball and Bowers' textbook on employment law*. 14th ed. Oxford: Oxford University Press.
- Lewis, D. and Sargeant, M. (2019) *Employment law: the essentials*. 15th ed. London: CIPD Kogan Page.
- Pitt, G. (2020) *Employment law*. 11th ed. London: Sweet and Maxwell.
- Taylor, S. and Emir, A. (2019) *Employment law: an introduction*. 5th ed. Oxford: Oxford University Press.
- Taylor, S. and Woodhams, C. (eds). (2016) *Human resource management: people and organisations*. 2nd ed. London: CIPD Kogan Page.

Journal articles

- Embleton, S. (2012) 5 rules for carrying out fair investigations. *Employers' Law*. September. pp14-15.
- Forming a contract of employment. (2011) *IDS Employment Law Brief*. No 924, May. pp15-19.
- Mandatory equal pay audits. (2014) *IDS Employment Law Brief*. No 1006, October. pp15-19.
- O'Sullivan, M., Turner, T. and Kennedy, M. (2015) Is individual employment law displacing the role of trade unions? *Industrial Law Journal*. Vol 44, No 2, July. pp222-245.
- TUPE changes: what you need to know. (2014) *IDS Employment Law Brief*. No 991, February. pp14-18.

Online resources

- CIPD. *Factsheets about employment law*. London: Chartered Institute of Personnel and Development. Available at: www.cipd.co.uk/knowledge/practical-guidance-a-z/factsheets
- CIPD. *Frequently asked questions about employment law*. London: Chartered Institute of Personnel and Development. Available at: www.cipd.co.uk/knowledge/practical-guidance-a-z/employment-law-resources
- CIPD. *Latest news in employment law*. London: Chartered Institute of Personnel and Development. Available at: www.cipd.co.uk/knowledge/fundamentals/emp-law/about/legislation-updates

Websites

- www.acas.org.uk
Website of Acas (Advisory, Conciliation and Arbitration Service)
- www.cipd.co.uk/knowledge
Link to the CIPD's Knowledge Hub, providing resources on 15 key topics in HR and L&D, including factsheets, research reports, guides, survey reports and more, as well as online journals and the HR and L&D Database
- www.equalityhumanrights.com/en
Website of the Equality and Human Rights Commission (EHRC)
- www.gov.uk/browse/employing-people
Government advice on employing people

5OS02

Advances in digital learning and development



About this unit

This unit focuses on how digital technology can be used to enhance learning and development engagement. It looks at existing and emerging learning technologies, how the use of digital content and curation is designed to maximise interaction and the value of online learning communities.

What you will learn

You will learn about the impact of technological development and how digital collaboration can impact the design and delivery of learning and development over time. This will include the risks and challenges that technology-based learning and development poses for organisations. You will also create engaging digital learning content to meet specific purposes and learning needs. Additionally, you will compare systems for delivering online and face-to-face learning and discuss the implications of these methods. Finally, you will assess the main skills required to facilitate online learning, including reference to your own development plan.

6 credits

60 hours total unit time
25 guided learning hours

Level 5

Learning outcome, assessment criteria and indicative content

1 Understand technological development in learning and development.

1.1 Evaluate how the development of technology and digital collaboration impacts the design and delivery of learning and development over time.

Development of technology in L&D, different technologies past, present and future, for example e-learning, strengths and weaknesses of LMS and LXP systems, discussion forums and chat rooms, webinars and web conferencing, virtual classrooms, free open resources, for example MOOCs, social media and networking, smart phones, virtual and augmented reality and artificial intelligence.

1.2 Evaluate the risks and challenges technology-based learning and development poses and how these are being addressed for:

- organisations
- learning and development professionals
- learners

Organisations: for example cost-benefit, failure to deliver or meet needs, obsolescence, data protection issues, for example hacking and security threats; staff misuse, potential for reduced control over L&D processes, accessibility to systems in work and out of work, lack of management or learner buy-in, challenges in implementation and system ownership. Ethical issues of learners using own technology and data, for example 'Bring Your Own Device' (BYOD). Opportunities for organisation to offer devices that can be also used for personal activities – 'Choose Your Own Device' (CYOD) or 'Corporate Owned Personally Enabled' (COPE).

L&D professionals: for example rapid changes in skills requirements for L&D

professionals; changes to and impact on role, stakeholder relationships including with vendors, ensuring accessibility for all including 24/7 (remote) availability; security and health issues.

Learners: for example increased IT skills requirement; potential change in accessing learning, greater need for self-direction, time for in-work learning, availability of technology, access and impact on personal life.

Issues addressed via strategy and policy statements, risk assessments and strategies to minimise risks, wider development opportunities, drop-in sessions, knowledge sharing etc.

2 Be able to create engaging digital learning content to meet specific purposes.

2.1 Assess the different types of digital learning content including the applications of each.

Choice of synchronous or asynchronous activities and the related content choices. Types of digital content, for example e-learning, videos, slideshows, screencasts, podcasts, infographics, animations, learning tutorials, app-based content, simulations, scenarios, games, curated content, augmented reality and virtual reality simulations.

2.2 Evaluate how the choice of digital learning content impacts learner engagement and meets identified needs.

Digital learning content types, consideration of the design factors which make digital content engaging and the human-centred design factors which make content likely to achieve objectives. Methods of measuring impact of digital learning material against a specific need, for example in-built facilities for monitoring

or measuring learner engagement and learner progress with regard to the content and prior identified learner objectives. Concept of bias particularly in learning materials and learning content, for example racial, gender stereotyping; cultural bias. Strategies for avoiding bias and checking materials against bias. Examples of how well-designed resources facilitate learning and how poorly designed materials can exclude or alienate learners.

2.3 Develop engaging learning content to address a specific need.

Identifying a clear need, for example:

- A digital facilitated presentation with presented content, use of effective visual design and interactive learner activities such as questions and polls.
- A podcast, as part of some individual online learning or to support the transfer of learning to work, where people are interviewed to contribute insights and tips for learners.
- A video or animation to support knowledge transfer or enhance practice.
- A facilitated collaborative group activity using an online open source networking solution supported by suitable resources.
- An augmented reality solution with a learning resource overlaid to the workplace environment.
- A series of personalised curated resources to meet a unique learner or group need using artificial intelligence.

3 Be able to apply a range of online facilitation functions and techniques to deliver an effective live online learning activity.

3.1 Compare systems for delivering live online learning activities, including their key facilitation functions.

Different examples of commercially available systems for webinars and virtual classrooms and their relative functionality, for example chat, polls, whiteboards, break-out rooms, use of media, document or resource sharing, learner feedback through 'hands up' and emojis to define system strengths and weaknesses.

3.2 Discuss how facilitation of a live online learning activity can differ from facilitation of a face-to-face learning activity and the implications of this for:

- **facilitators**
- **learners**
- **learning administration.**

Differences between facilitation of face-to-face and online learning activities for:

Facilitators: activities undertaken; different level of proximity to learners, ability to gauge learner response and 'group atmosphere'; maintaining engagement and energy levels; different types of collaboration activities and different approaches to managing learner dynamics; own reaction and motivation.

Learners: level of engagement, impact on more introverted learners; level of technological expertise, availability of systems and adequate connectivity, uncontrolled interruptions and distractions.

Learning administration: preparing and issuing joining instructions; induction of new learners, ensuring technical support during activity, moderation, overcoming access and technical problems.

Learning outcome, assessment criteria and indicative content

3.3 Assess the main skills required to facilitate online learning, including reference to your own development plan.

Main skills required for online facilitation: for example preparation of self, preparation of learners, managing learners remotely, maintaining engagement, participation and chat, encouraging collaborative learning, monitoring and encouraging participation, using functions while presenting, running polls, facilitating breakout rooms, managing and being prepared for technological issues.

3.4 Demonstrate online facilitation skills within a live online learning activity.

Online facilitation skills: for example, being prepared and ensuring familiarity with software and material. Knowing the learners and aligning/adjusting level, terminology and examples to their context. Welcoming learners; checking learner comfort levels with technology and accessibility/connectivity. Setting and agreeing expectations. Effective use of a range of system facilitation functions and engagement tools. Use of voice, pace, tone and visuals to create interest and engagement. Monitoring participation levels and reaching out to less engaged learners; checking learning at appropriate points. Facilitating breakout rooms. Appropriate use of web cams. Strategies for maintaining facilitator energy and engagement. Effective closing of session.

Books

Beevers, K., Hayden, D. and Rea, A. (2019) *Learning and development practice in the workplace*. 4th ed. London: CIPD Kogan Page.

Clark, D. (2020) *Artificial intelligence for learning: how to use AI to support employee development*. London: Kogan Page.

Collins, S. and Lancaster, A. (2015) *Webinars pocketbook*. Alresford: Management Pocketbooks Ltd.

Huggett, C. (2017) *Virtual training tools and templates: an action guide to live online learning*. Alexandria, VA: ATD Press.

Lancaster, A. (2019) *Driving performance through learning: develop employees through effective workplace learning*. London: Kogan Page.

Loon, M. (2017) *Designing and developing digital and blended learning solutions*. Ebook. London: CIPD Kogan Page.

Shepherd, C. (2012) *Digital learning content: a designer's guide*. Morrisville, NC: Lulu Press.

Wheeler, S. (2019) *Digital learning in organizations: help your workforce capitalize on technology*. London: Kogan Page.

Key journals

People Management

Available at:

www.peoplemanagement.co.uk/

TD: Talent Development

Available at:

www.cipd.co.uk/knowledge/journals

Online resources

Hayden, D. (2020) *Digital learning*. Factsheet. London: Chartered Institute of Personnel and Development. Available at: www.cipd.co.uk/knowledge/fundamentals/people/development/digital-learning-factsheet

Overton, L. and Dixon, G. (2016) *Preparing for the future of learning: a changing perspective for L&D leaders*. In-Focus report. London: Towards Maturity. Available at: www.cipd.co.uk/knowledge/strategy/development/future-learning-leadership-perspectives

Websites

www.cipd.co.uk/knowledge
Website of the Chartered Institute of Personnel and Development and link to the CIPD's Knowledge Hub, providing resources on 15 key topics in HR and L&D, including factsheets, research reports, guides, survey reports and more, as well as online journals and the HR and L&D Database

www.td.org/
Website of the Association for Talent Development (ATD), formerly ASTD, the American association concerned with developing talent in organizations

5OS04

People management in an international context

**About this unit**

This unit is designed to give those practitioners working in People Management in an international context, the opportunity to focus on the complexities and considerations essential to this.

What you will learn

You will examine contextual factors in relation to managing people from an international perspective and assess the drivers and benefits of employment in an international context. You will explain convergent and divergent approaches to policy and practice and learn about the factors relevant in selecting and resourcing, as well as the challenges and cultural differences to consider. Additionally, you will evaluate the reasons expatriates are used for international working and the formation of appropriate policies and processes for selecting, preparing and managing overseas repatriation.

6 credits

60 hours total unit time
25 guided learning hours

Level 5

1 Understand people practice from an international perspective.

1.1 Examine the contextual factors of an international organisation.

Definition of an international organisation; understanding of organisational structure, type, size, multinational companies, centralised, decentralised, national domestic, international resourcing, language, law, customs, national difference, technical capability/ infrastructure, economic situation, dominant culture and local awareness, Hofstede's cultural diversity and difference.

1.2 Assess the drivers and benefits of employment in an international context.

Appreciation of the transferral of technological and business knowledge, skills and behaviours for the organisation and individual, enhanced diversity, facilitation of control, improved communications, competitive advantage, talent management, increased cultural awareness, enhanced business growth, career, networking and expansion of professional connections, financial and non-financial benefits.

1.3 Explain convergent or divergent approaches to inform people management policy and practice choices.

Nature and factors that affect convergent and divergent approaches to managing the range of people practice choices across different countries or regions, for example shaping and standardisation of key people practices that are implemented across international organisations. Advantages and disadvantages of applying a 'one country' approach. Factors that affect the acceptance of divergence practices to allow national subsidiaries to implement their own country's people practices

accommodating localisation, including handling conflicting requirements.

2 Understand the challenges of people practice in an international context.

2.1 Evaluate the factors to be considered when selecting and resourcing for international assignments.

Perlmutter's orientation of international firms, polycentric, ethnocentric, geocentric and regional-centric orientations; different factors to include identification of qualities and behaviours, acceptance of diversity, difference, emotional resilience, ability to cope with long- and short-term change, well-being, duty of care, language, personal contexts, contractual terms and conditions, consideration of cross-national HRM dominant cultural viewpoint.

2.2 Explain why people practices can vary across international boundaries.

Consideration of how core and specialist people practices are affected, modified and disseminated in regard to local employment legislation and regulations. Differences in managing employee relations, diversity and ethical practice, discipline and grievance, performance and reward, influences of customs and cultures.

2.3 Evaluate the cultural and institutional differences to be considered when managing international people practice.

Awareness of cross-cultural comparisons, strategies, policies and processes, isomorphic approaches; variations in national values, culture, belief and behavioural patterns and how these affect decisions; understanding of approaches to communication, concepts and social justice, pay systems and reward. Institutional differences to include the role of the state, financial sectors, law,

Learning outcome, assessment criteria and indicative content

approaches to education and training, labour force characteristics.

employees, skills differences, timeframes, cultural requirements, etc.

3 Understand the importance of people practice in an international context.

3.1 Evaluate the function of people practice in an international organisational context.

Knowledge and ability to apply supporting strategies across regional boundaries; differing role expectations between countries, for example administrative, supportive, guiding, executive; supporting leadership and management; developing and operating people practice systems; refining and developing policies and practices to support international working practices.

3.2 Consider the practices and policies that are shaped by the international context.

Awareness of applying a range of policies and practices to consider cultural and institutional differences, range of factors and choices affecting use of parent company HRM policies and practices being adopted by subsidiary companies, partnership or supplier/customer organisations.

4 Understand the process and benefits of managing expatriates.

4.1 Evaluate the reasons that companies use expatriates for international working.

Identification of the benefits, for example short-term projects, requirement for specialist skills, speed and associated imperatives, commercial pressures, training, development and career advancement and ROI for using expatriates; disadvantages of using local

4.2 Explain the process for selecting, preparing and managing expatriates for overseas relocation for work.

Difference in selecting expatriates for domestic and overseas assignments; selection for different types of expatriation, including the use of performance management and appraisal, job skills, cultural suitability, personal knowledge, skills, aspirations and interest, and career planning.

Preparing and managing the process; preparing staff for overseas working, identification of different contractual models for overseas working. Administration in preparation for the relocation programmes, providing appropriate learning and development support for expatriates to include knowledge, skills and behaviours required, social and domestic constraints, pay and benefits, health checks and packages, travel and accommodation provision, family support.

4.3 Explain how people practice can support re-entry and resettlement of overseas workers.

Policies and processes to support the expatriate upon return; reintegration of assignees into organisational career systems; management of their well-being through their changing professional and personal contexts, job role, career direction, by providing practical advice, guidance and support.

Books

Brewster, C., Houldsworth, E. and Sparrow, P. (2016) *International human resource management*. 4th ed. London: CIPD Kogan Page.

McNulty, Y. and Inkson, K. (2013) *Managing expatriates: a return on Investment approach*. New York: Business Expert Press.
www.businessexpertpress.com

Online resources

CIPD. (2016) *International talent management*. Factsheet. London: Chartered Institute of Personnel and Development. Available at:
www.cipd.co.uk/knowledge/strategy/resourcing/international-talent-factsheet

Houldsworth, L. (2016) *International culture*. Factsheet. London: Chartered Institute of Personnel and Development. Available at:
www.cipd.co.uk/knowledge/culture/working-environment/international-culture-factsheet

Houldsworth, L. (2016) *International resourcing and selection*. Factsheet. London: Chartered Institute of Personnel and Development. Available at:
www.cipd.co.uk/knowledge/strategy/resourcing/international-factsheet

Key journals

International Journal of Human Resource Management

Available at:
www.cipd.co.uk/knowledge/journals

Personnel Review

People Management

Available at:
www.peoplemanagement.co.uk/

Websites

www.cipd.co.uk
Website of the Chartered Institute of Personnel and Development

5OS05

Diversity and inclusion



About this unit

This unit focuses on how adapting leadership styles to manage, monitor and report on equality and diversity is essential for inclusive practice and legislation. The importance of promoting a diverse and inclusive workforce to drive a positive culture and celebrate diversity and inclusion increases organisational performance as well as meeting the needs of employees and customers more effectively.

What you will learn

You will cover the value that diversity and inclusion has in the workplace and how a diversity and inclusion strategy can support organisations. You will evaluate the contribution and challenges that diversity and inclusion brings and how this meets employee and customer needs. You will learn about the requirements of employment legislation and regulations and the key requirements for statutory reporting on disability, ethnicity, gender and pay gap reporting. Additionally, you will undertake a review of organisational policies and practices in relation to diversity and inclusivity at work and conduct an equality impact assessment on a people practice policy. Finally, you will evaluate the role of managers and leaders in creating a culture that celebrates difference and embraces diversity and inclusion.

6 credits

60 hours total unit time
25 guided learning hours

Level 5

1 Understand the importance of embracing diversity and inclusion in organisations.

1.1 Assess the value of diversity and inclusion in organisations for employees, customers and wider stakeholders.

Moral/social case includes respect, dignity, acceptance and understanding of cultural differences, tolerance, friendship, safety and well-being, community relations, gender pay gap. Business case, organisation benefits from greater flexibility, the opportunity to access wider talent pools, improved decision making, greater innovation and ideas generation, improved teamwork, better interpersonal relationships between managers and workers and between co-workers, improved employee engagement and retention. Wider business advantages include access to new markets, product/service innovations, access to broader customer bases, improved corporate reputation.

1.2 Explain the key elements of the legal framework surrounding diversity and inclusion.

Overview of equality and diversity legislation; the Equality Act 2010, protected characteristics, Equality Impact Assessment (EqIA) requirements; ethnicity, gender and pay gap data, an assessment of group-based discrimination and disadvantage and how organisations can protect groups and individuals from unlawful direct or indirect discrimination, harassment and victimisation. Review of key employment cases to highlight the consequences of non-compliance and demonstrate regulation in action.

1.3 Identify the barriers to achieve diversity and inclusion in organisations.

Weaknesses in senior leadership commitment/lack of willingness to present a compelling case, difficulties in attracting a diverse workforce, costs, creating positive role models, managing change, overcoming individual and group resistance/conflict, teamworking dynamics, cultural differences, misinformation and information gaps, deficiencies in training and development.

2 Be able to ensure diversity and inclusion is reflected and promoted in the organisation.

2.1 Conduct an organisational review to improve diversity and inclusion in an organisational context.

Focus on a range of organisational policies and practices, including but not limited to flexible working policy, recruitment and selection, talent acquisition and talent management, promotion, training and development, reward; consider factors such as access requirements and criteria setting, for example age, experience, qualifications, job duties, hours of work, place of work, dress code and other facets of personal appearance.

Consideration of the merits and controversies surrounding targeted support structures and/or accelerated development programmes introduced to provide development for underrepresented groups in achieving their career potential.

Consideration of the context in which the policies and practices operate; training and development for employees on understanding unconscious bias and forms of direct and indirect discrimination, harassment and victimisation; developing awareness among employees of the value of diversity and inclusion at work, approaches may include coaching,

Learning outcome, assessment criteria and indicative content

mentoring and sponsorship and access to development opportunities.

2.2 Conduct an Equality Impact Assessment (EqIA) to ensure that there are no disproportionate impacts on protected individuals or groups.

Legislation related to EqIA, protected groups and individuals, when an EqIA is necessary, systematically factoring EqIA into policy development, policy review, new services and organisational practices, periodic review processes, critical incident reviews. Who should conduct an EqIA, best practice EqIA templates, note-taking and record-keeping.

2.3 Develop approaches to strengthen diversity and inclusion within organisational policies and practices.

Guidance documents to support policy development and policy review, training and development for those responsible for interpreting and implementing policy, for example conscious and unconscious bias, dignity at work, cross-cultural communication, religion and belief. Provision of best practice examples and case studies, role of induction and onboarding for managers and leaders, leadership development programmes and coaching and mentoring in the workplace to support managers responsible for managing and developing others. Provision of facilities to meet equality, diversity and cross-cultural needs, for example crèche, area for breastfeeding, prayer room, particular washing facilities; and also, contractual arrangements for hours/days of work.

3 Be able to embed best practice approaches to diversity and inclusion.

3.1 Evaluate the role managers and leaders play in creating an organisational culture which fully embraces diversity and inclusion.

The role of managers and leaders in creating a positive culture in which diversity and inclusion is fully embraced and enabled. D&I culturally embedded through understanding difference and its value, effective communication, training and development, role modelling, challenging behaviour and managing discrimination effectively.

3.2 Recommend approaches that organisations can take to celebrate difference and engender a culture of diversity and inclusion among workers and other stakeholders.

Celebrating events and ceremonies, for example Black History Month, PRIDE, Diwali, Eid, Christmas, the role of internal communication; awards, newsletters, blogs, discussion forums, case studies, role models and champions; cultural awareness and employee engagement measurements with a focus on key drivers that will enhance diversity and inclusion, such as accommodating individual differences, teamworking and relationships, respect and belonging.

3.3 Develop approaches to measure and monitor the impact of a diverse and inclusive organisational culture.

Quality assurance systems, tools and processes to monitor and review. Key indicators may include staff survey measures and outcomes, for example staff satisfaction, advocacy score, training and development evaluation, applicant data/trends, reputational gain/employer of choice, average tenure, career

development/progression, reduction in appeals, grievances and disciplinaries, etc. Pay and reward data, relationship and feedback from D&I professional bodies, reputational feedback and media reporting results/relationship.

Learning resources

Books

Brown, J. (2017) *Inclusion: diversity, the new workplace and the will to change*. 2nd ed. Hartford, CT: Publish Your Purpose Press.

Duncan, J. (2019) Think outside the box: leading diversity and inclusion in the workplace. [–]: The Author.

Frost, S. and Kalman, D. (2016) *Inclusive talent management: how business can thrive in an age of diversity*. London: Kogan Page.

Sweeney, C. and Bothwick, F. (2016) *Inclusive leadership: the definitive guide to developing and executing an impactful diversity and inclusion strategy*. Harlow: Pearson Education.

Journal articles

Bader, A.K., Kemper, L.E. and Jintae, F.J. (2019) Who promotes a value-in-diversity perspective? A fuzzy set analysis of executives' individual and organizational characteristics. *Human Resource Management*. Vol 58, No 2, March/April. pp203-217.

Baska, M. (2019) Businesses 'feel free to discriminate' because equality law is not being enforced. *People Management*. 30 July. Available at: www.peoplemanagement.co.uk/news/articles/businesses-feel-free-to-discriminate .

Faragher, J. (2017) *Beyond bias*. *People Management*. 27 April. Available at: www.peoplemanagement.co.uk/long-reads/articles/beyond-bias .

Noon, M. (2018). Pointless diversity training: unconscious bias, new racism and agency. *Work, Employment and Society*. Vol 32, No 1, February. pp198-209.

Phillips, K.W., Dumas, T.L. and Rothbard, N.P. (2018) Diversity and authenticity. *Harvard Business Review*. Vol 96, No 2, March/April. pp132-136.

CIPD members can use our online journals to find articles from over 300 journal titles relevant to HR.

Members and People Management subscribers can see articles on the People Management website.

Online resources

ACAS. (2018) *Prevent discrimination: support equality*. Guidance. London: ACAS. Available at: https://archive.acas.org.uk/media/4402/Prevent-discrimination-support-equality/pdf/Prevent_discrimination_June_2018.pdf .

Gifford, J., Green, M. and Young, J. (2019) *Diversity management that works: an evidence-based view*. Research report. London: Chartered Institute of Personnel and Development. Available at: www.cipd.co.uk/knowledge/fundamentals/relations/diversity/management-recommendations .

Green, M., Bond, H. and Miller, J. (2018) *Diversity and inclusion at work: facing up to the business case*. Report. London: Chartered Institute of Personnel and Development. Available at: www.cipd.co.uk/knowledge/fundamentals/relations/diversity/diversity-inclusion-report .

Green, M. and Young, J. (2019) *Building inclusive workplaces: assessing the evidence*. Research report. London: Chartered Institute of Personnel and Development. Available at: www.cipd.co.uk/knowledge/fundamentals/relations/diversity/building-inclusive-workplaces .

Houldsworth, L. (2016) *International diversity management*. Factsheet. London: Chartered Institute of Personnel and Development. Available at: www.cipd.co.uk/knowledge/fundamentals/relations/diversity/international-management .

Miller, J. and Green, M. (2019) *Diversity and inclusion in the workplace*. Factsheet. London: Chartered Institute of Personnel and Development. Available at: www.cipd.co.uk/knowledge/fundamentals/relations/diversity/factsheet .

Wiles, D. (2015) *Square holes for square pegs: current practice in employment and autism*. Report. London: Business Disability Forum. Available at: <https://members.businessdisabilityforum.org.uk/resource-category/resource/research-and-insight-square-holes-employment-autism/> .

Worman, D. and Suff, R. (2015) *Quotas and targets: how do they affect diversity progress?*. Policy report. London: Chartered Institute of Personnel and Development. Available at: www.cipd.co.uk/knowledge/fundamentals/relations/diversity/quotas-impact-report .

www.gov.uk/government/organisations/government-equalities-office
Website of the Government Equalities Office

Websites

www.acas.org.uk/discrimination-bullying-and-harassment

Website of ACAS, section for equality, diversity and inclusion

www.blackhistorymonth.org.uk/

Website of the Black History Month

www.cipd.co.uk/knowledge/fundamentals/relations/diversity

Website of the Chartered Institute of Personnel and Development, section for diversity and inclusion

www.enei.org.uk/

Website of the Employer's Network for Equality and Inclusion

www.equalityhumanrights.com/en

Website of the Equality and Human Rights Commission

www.equallyours.org.uk/

Website of Equally Ours, previously the Equality and Diversity Forum

www.gov.uk/employer-preventing-discrimination

Website of the UK Government with advice for employers on preventing discrimination

5OS06

Leadership and management development



About this unit

This unit builds on the fundamentals of learning and development, taking a closer look at the essential area of leadership and management and how this is critical in developing the right culture and behaviours to establish a working environment which is cohesive, diverse, innovative and high-performing. Choosing the right tools and approaches to facilitate development will ultimately impact organisational effectiveness.

What you will learn

You will develop understanding of the factors that drive the need for leadership and management within the organisation and examine the interdependent nature of leadership and management. You will identify the roles leaders and managers perform in different contexts and assess the skills and competencies required. Additionally, you will explore the role of the people professional in supporting leadership and management development and the importance of ensuring that diversity and inclusion is an integral part of this. Finally, you will evaluate indicators of successful leadership programmes, find out about the range of stakeholders involved and assess the impact that leadership and management development has on the organisation.

6 credits

Level 5

60 hours total unit time
25 guided learning hours

1 Understand the relevance of leadership and management and the knowledge, skills and behaviours required.

1.1 Analyse the external factors that drive the need for leadership and management within the organisation.

Stages of organisational development, competition, market-led, external environment audit tools, speed and extent of change (local, national, global), desirable vs imperative factors, self-determined vs imposed.

1.2 Explain the key differences between leadership and management roles and styles and the implications of each for organisational effectiveness.

Differences and interchangeability of leadership and management roles to consider aspects of context, power, authority and control; task vs people perspectives; management as authority and control; leadership as vision and influence; managers and subordinates vs leaders and followers. Styles might include such things as qualities or trait theories, contingency theories, task, transformational vs transactional; situational leadership, inspirational, functional models; scientific management; human relations school; strategic vs operational roles and types of leadership and management, autocratic, democratic, laissez-faire. Employee-centred, production-centred. Servant leadership, authentic leadership.

1.3 Compare the different knowledge, skills and behaviours required for leadership and management in organisations.

Soft and hard approaches in context, emotional intelligence, attribution theory and cognitive biases, leading and managing people in a global context and from diverse cultural backgrounds. Ethical,

moral and value driven governance, awareness and promotion of resilient wellbeing approaches. Charismatic, visionary, romantic, cultural and champion ethical compliance.

2 Understand a range of different learning and development initiatives in developing leaders and managers.

2.1 Discuss the role of people professionals in supporting leadership and management development initiatives.

Role people professionals have in supporting and developing leadership and management development initiatives, for example establishing learning and development needs; design and delivery of learning and development interventions for leadership and management; identifying, assessing and supporting L&D for potential leaders and managers; providing advice on individual and group development.

2.2 Evaluate the different concepts and range of approaches that are available for effective leadership and management development.

How and why people learn, the main theories affecting leadership and management learning; formal vs informal approaches; for example educational-based programmes, secondments, on- and off-the-job learning, job rotation, shadow boards, coaching and mentoring, knowledge conversation, cognitive vs practical, collaborative vs individual; peer learning, learning sets, action learning; cloud-based, e-learning; skills rehearsal, simulation; social media, internal vs external. Use of competency-based frameworks. Assessment and development centres. Leadership and management self-development. The importance of reflection in leadership and

Learning outcome, assessment criteria and indicative content

management learning. Barriers to leadership and management learning.

2.3 Discuss why diversity and inclusion should be an integral component of leadership and management development initiatives.

Aspects of development that should include D&I, barriers to D&I in initiatives, areas for attention (such as use of language, technology, cultural norms and expectations, differences in non-verbal signals and interpretations, issues with regard to practical activities, and fonts, text sizes, use of colour, volume levels, brightness levels, etc).

3 Understand the effectiveness of leadership and management development initiatives.

3.1 Evaluate the indicators of successful leadership and management development initiatives.

Individual and organisational performance evidence, effective succession, retention rates, value-added KPIs, employee involvement satisfaction indicators, achievement of KPIs, value-added measures. Key theories and concepts of evaluation of learning, for example Kirkpatrick. Extent to which the established purposes and identified learning needs have been met.

3.2 Explain the range of stakeholders and the involvement they have in leadership and management development initiatives.

Identifying key stakeholders. Involving and ensuring contributions of key stakeholders to include sponsors for initiatives, participants, top and senior leaders, managers and non-learning and development professionals. Demonstrating and communicating aims and objectives and achievement of success indicators.

3.3 Assess the impact and importance that leadership and management development initiatives have on organisational culture, strategy, reputation and performance.

Perception vs reality, nature and types of change possible/likely, measuring effect of change, positive vs negative impact, impact on who (individuals, groups, departments, organisation as a whole, customer/client perceptions), transitional vs temporary vs sustained. Increase in motivation and engagement resulting in reduced churn, increase in quantity or quality of organisational outputs, increase in external positive reporting and media coverage, increase in internal harmony and synergy in current and future projects.

Books

Adair, J. (2019) *Develop your leadership skills: fast effective ways to become a leader people want to follow*. 4th ed. London: Kogan Page.

Carmichael, J., Emsell, P. and Collins, C. (2011) *Leadership and management development*. New York: Oxford University Press.

Dalton, K. (2010) *Leadership and management development: developing tomorrow's managers*. Harlow: Financial Times Prentice Hall.

Gold, J., Thorpe, R., and Mumford, A. (2010) *Leadership and management development*. 5th ed. London: CIPD Kogan Page.

Yarlagadda, R. (2016) What's holding back leadership learning? Article. *In a Nutshell*. Issue 62. London: Chartered Institute of Personnel and Development. Available at: www.cipd.co.uk/news-views/nutshell/issue-62/leadership-learning-held-back .

Websites

www.ahrd.org/
Website for the Academy of Human Resource Development

www.cipd.co.uk
Website of the Chartered Institute of Personnel and Development

www.leadershiptrust.co/
Website of the Leadership Trust

Key journals

Career Development International
Human Resource Management Journal
Available at:
www.cipd.co.uk/knowledge/journals

Journal of Management Development
Leadership and Organisation Development Journal
Management Learning
People Management
Available at:
www.peoplemanagement.co.uk/

Online resources

Haden, S. and Davidge, J. (2019) *Leadership in the workplace*. Factsheet. London: Chartered Institute of Personnel and Development. Available at: www.cipd.co.uk/knowledge/strategy/leadership/factsheet

Hayden, D. (2020) *Management development*. Factsheet. London: Chartered Institute of Personnel and Development. Available at: www.cipd.co.uk/knowledge/strategy/development/management-factsheet

5OS07

Well-being at work



About this unit

This unit introduces well-being and its importance in the workplace. It explores existing links between work, health and well-being, examining how to manage well-being and how it links with other areas of people management practice, and wider organisational strategy. The unit considers key elements of well-being programmes and the stakeholders involved, examining organisational responsibilities and the outcomes of managing well-being for employees and employers.

What you will learn

You will explain how well-being can be managed to support organisational goals and you will evaluate key issues and theories related to well-being at work. You will identify the contributory stakeholders that are required to maintain well-being initiatives at work and how well-being interacts with other areas of people management practice. Finally, you will apply your learning and develop a plan for a well-being programme, considering how you will implement and monitor its success.

Level 5

6 credits

60 hours total unit time
25 guided learning hours

1 Understand well-being and its relevance to workplaces.

1.1 Evaluate issues and key theories in well-being at work.

Contemporary issues involving the changing nature of work, workers and workplaces: presenteeism, shift work, change, workload, job demands; theories relating to well-being such as positive psychology, burnout, psychological contract, work-life balance, and individual factors such as stress, increasing prevalence of mental health conditions, care responsibilities and financial concerns, working at home and remote working.

1.2 Explain how well-being can be managed to support organisational goals.

Definition of well-being as it is understood by the CIPD and others, and its importance on the agenda of people professionals. Management of well-being: absence management; occupational health; employee assistance programmes and procedures related to management of individual cases; how the management of well-being can support organisational goals.

1.3 Assess the value of adopting well-being practices in organisations.

Preventing stress, creating positive environments, driving high performance and motivation, productivity and employee engagement and retention; ultimately making the workplace more attractive and a corporately responsible place to work, reduced friction, conflict and confrontation, strengthening of psychological contracts. Strategic importance for broader organisational health and sustainability.

2 Understand how well-being is shaped by the organisation's internal and external context.

2.1 Identify how key stakeholders can contribute to improvements in well-being at work.

Successful implementation depends on stakeholder responsibilities and commitment, including people practice function, line managers and senior leaders, including training of line managers in recognising and responding to issues (for example conflict resolution, managing mental ill health, promoting well-being).

2.2 Explain how well-being interacts with other areas of people management practice.

Recognition of integration with all aspects of people management activities. Review with other areas of people practice – such as job design, health and safety, diversity, reward, engagement, learning and development.

2.3 Analyse how organisational context shapes well-being.

Understanding of different approaches being suitable in differing contexts and the role of well-being not being a standalone initiative but being fully integrated, for example the case of South Liverpool Homes (CIPD, 2016). Well-being approach linked to corporate strategy and needs of workers, size of organisation, sector, composition of workforce, etc.

3 Be able to develop a wellbeing programme.

3.1 Explore well-being initiatives in relation to an organisation's needs.

Well-being initiatives such as health promotions and facilities, health

Learning outcome, assessment criteria and indicative content

checks/insurance, well-being benefits, such as cycle to work schemes, toolkits, flexible hours etc.

3.2 Design a well-being programme relevant to the organisation.

Identifying and defining the area of well-being for attention, identifying the intended benefits to be gained and how these will be measured (success criteria), identifying boundaries and constraints that might affect the design, considering such things as stakeholder contribution, costs, resource needs, timeframes, determining appropriate format for dissemination.

3.3 Explain how you would implement a well-being programme suitable for the organisation.

Recognition that it is not a case of 'one size fits all' but needs to appreciate characteristics of both workforce and the organisation, such as MNC, small firm etc. Change management, research and consultancy skills, time management, leading a project, gaining support from senior managers, characteristics of an effective implementation plan.

3.4 Explain how a well-being programme can be evaluated and monitored.

Evaluation leading to more successful organisational outcomes. This includes continuous improvement and measuring well-being on a regular basis qualitatively and quantitatively with a long-term view and with regard to staff anonymity to ensure a reliable result. This will involve assessing the quality of well-being outcomes, through staff surveys of well-being, focus groups, interviews, benchmarking and engagement surveys. Metrics to measure outcomes, for example absence rates and lengths, workplace injuries, data on complaints and requests for special treatment, take up of EAP, staff turnover, performance and productivity.

Books

- Cooper, C.L. and Leiter, M.P. (eds.) (2017). *The Routledge companion to wellbeing at work*. Abingdon: Routledge.
- Hesketh, I. and Cooper, C. (2019). *Wellbeing at work: how to design, implement and evaluate an effective strategy*. London: CIPD Kogan Page.
- Mitchell, D. (2018) 50 top tools for employee wellbeing: a complete toolkit for developing happy, healthy, productive and engaged employees. London: Kogan Page.
- Vickerstaff, S., Phillipson, C. and Wilkie, R. (eds.) (2013) *Work, health and wellbeing: the challenges of managing health at work*. Bristol: Policy Press.

Journal articles

- Dediu, V., Leka, S. and Jain, A. (2018). Job demands, job resources and innovative work behaviour: a European Union study. *European Journal of Work and Organizational Psychology*. Vol 27, No 3. pp310-323.
- Guest, D. E. (2017) Human resource management and employee well-being: towards a new analytic framework. *Human Resource Management Journal*. Vol 27, No 1, January. pp22-38.
- Maslach, C., (2017). Finding solutions to the problem of burnout. *Consulting Psychology Journal: Practice and Research*. Vol 69, No 2, June. pp143-152.
- Miller, J. (2016) The well-being and productivity link: a significant opportunity for research-into-practice, *Journal of Organizational Effectiveness*. Vol 3, No 3. pp289-311.

Online resources

- CIPD. (2016) *Growing the health and wellbeing agenda: from first steps to full potential*. Policy report. London: Chartered Institute of Personnel and Development. Available at: www.cipd.co.uk/knowledge/culture/well-being/health-agenda-report
- CIPD and Mind. (2018). *People managers' guide to mental health*. Guide. London: Chartered Institute of Personnel and Development. Available at: www.cipd.co.uk/knowledge/culture/well-being/mental-health-support-report
- CIPD and Simplyhealth. (2020) *Health and wellbeing at work*. Survey report. London: Chartered Institute of Personnel and Development. Available at: www.cipd.co.uk/knowledge/culture/well-being/health-well-being-work
- Jordan, H. (2019). The line manager's role in mental wellbeing. Article. *HR Magazine*, 22 August. Available at: www.hrmagazine.co.uk/article-details/the-line-managers-role-in-mental-wellbeing
- Meechan, F. (2018) *Compassion at work toolkit*. Working paper. Manchester: National Forum for Health and Wellbeing at Work. Available at: www.researchgate.net/publication/322404395_Compassion_at_Work_Toolkit
- Office for National Statistics. (2019). *Sickness absence in the UK labour market: 2018*. Available at: www.ons.gov.uk/employmentandlabourmarket/peopleinwork/labourproductivity/articles/sicknessabsenceinthelabourmarket/2018
- Stevenson, D. and Farmer, P. (2017). *Thriving at work: The Stevenson/Farmer review of mental health and employers*. Report. London: Department of Health and Social Care. Available at: www.gov.uk/government/publications/thriving-at-work-a-review-of-mental-health-and-employers

Learning resources

Suff, R. (2020) *Well-being at work*.
Factsheet. London: Chartered Institute of
Personnel and Development. Available
at: www.cipd.co.uk/knowledge/culture/well-being/factsheet

Websites

www.acas.org.uk/health-and-wellbeing
Website of ACAS, section on health and
wellbeing

www.cipd.co.uk/knowledge/culture/well-being
Website of the Chartered Institute of
Personnel and Development, section of
the Knowledge Hub on well-being

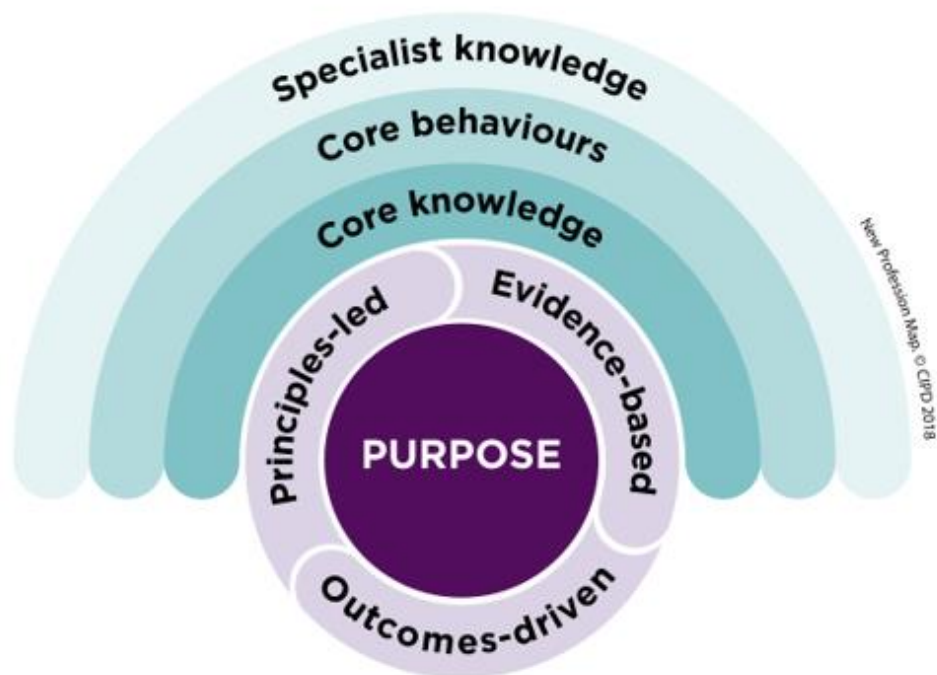
Appendix

Appendix A – Alignment to the Profession Map

The table below shows the areas of the core knowledge and core behaviours of the Profession Map covered in the three core units of the CIPD Level 5 Associate Diploma in Organisational Learning and Development.

| Core unit | Profession Map areas |
|-----------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 5CO01 Organisational performance and culture in practice | <ul style="list-style-type: none">▪ People practice▪ Culture and behaviour▪ Business acumen▪ Analytics and creating value▪ Digital working▪ Change▪ Valuing people▪ Commercial drive |
| 5CO02 Evidence-based practice | <ul style="list-style-type: none">▪ Culture and behaviour▪ Business acumen▪ Analytics and creating value▪ Ethical practice▪ Professional courage and influence▪ Insights focused▪ Situational decision making▪ Commercial drive |
| 5CO03 Professional behaviours and valuing people | <ul style="list-style-type: none">▪ Ethical practice▪ Culture and behaviour▪ Professional courage and influence▪ Valuing people▪ Working inclusively▪ Passion for learning▪ Insights focused▪ Situational decision making |

The CIPD Profession Map



Core knowledge

- People practice
- Culture and behaviour
- Business acumen
- Analytics and creating value
- Digital working
- Change



Core behaviours

- Ethical practice
- Professional courage and influence
- Valuing people
- Working inclusively
- Commercial drive
- Passion for learning
- Situational decision-making
- Insights focused



Specialist knowledge

- Employee experience
- Employee relations
- Diversity and inclusion
- Learning and development
- Reward
- Talent management
- Resourcing
- Organisation development and design
- People analytics

Appendix B – Exemption mapping

Agreed transition exemptions

| Units | Transition arrangements |
|-----------------------------------------------------------------------|-------------------------------------------------------------------------------------------|
| 5CO01 Organisational performance and culture in practice | n/a |
| 5CO02 Evidence-based practice | n/a |
| 5CO03 Professional behaviours and valuing people | n/a |
| 5LD01 Supporting self-directed and social learning | n/a |
| 5LD02 Learning and development design to create value | n/a |
| 5LD03 Facilitate personalised and performance focused learning | n/a |
| 5OS01 Specialist employment law | Completion of 5EML/5ELW Employment Law |
| 5OS02 Advances in digital learning and development | Completion of 5DBS Designing and Developing Digital and Blended Learning Solutions |
| 5OS04 People management in an international context | n/a |
| 5OS05 Diversity and inclusion | n/a |
| 5OS06 Leadership and management development | n/a |
| 5OS07 Well-being at work | n/a |

Appendix C – Apprenticeship mapping

The table below indicates where the **knowledge criteria** of the Level 5 Learning and Development Consultant/Business Partner Apprenticeship maps (fully or partially) to the CIPD Level 5 Associate Diploma in Organisational Learning and Development.

The table is not designed to be used to work out exemptions or recognition of prior learning, but as a guide to link subject themes and identify gaps.

Learning and Development Consultant/Business Partner Standard – Level 5

| Apprenticeship knowledge assessment criteria | | Mapping |
|----------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|
| K1 | Paradigms, theories and models that underpin effective adult learning, group behaviour and learning culture, for example behaviourism, cognitivism, constructivism, neuroscience. | ● |
| K2 | Legislation and policies that influence learning design and delivery. | ● |
| K3 | The merits of different learning delivery channels to select an appropriate face-to-face, blended or digital solution. | ● |
| K4 | The latest learning practice, trends and emerging thinking. Current research and appropriate application of best practice/best fit solutions. | ● |
| K5 | Positively incorporating diversity and inclusion into L&D interventions and processes. Researching and applying current best practice in this area. | ● |
| K6 | Change management methodologies, and the principles of project management. | ● |
| K7 | Consultancy tools and techniques, for example the use of SWOT, 5 Whys, weighted matrix, etc, providing costed recommendations and projected impact/ROI/ROE. | ● |
| K8 | Their organisation's vision, mission, values, strategy, plans and stakeholders; its external market and sector and the opportunities and the challenges and issues it faces. | ● |
| K9 | How business, learning and HR key performance indicators and metrics build a clear picture of how the business is performing. | ● |
| K10 | The process of stakeholder mapping to define interactions with staff that are part of the learning needs analysis, design, delivery, and evaluation. | ● |
| K11 | How to measure the impact, return on investment/expectation of learning on the business. | ● |

Key ● full map ○ partial map ✖ insufficient map

| Apprenticeship knowledge assessment criteria | | Mapping |
|----------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|
| K12 | The L&D structure required to meet business needs, and whether this should be in-house, outsourced and how to source specialist expertise when required. | ○ |
| K13 | The various L&D roles, responsibilities and skills required to design and deliver face-to-face, blended or digital solutions as appropriate to their role. | ✕ |
| K14 | The policies and processes required for effective organisation learning. | ○ |
| K15 | How to prepare, monitor and manage a budget. | ○ |
| K16 | The collection of data and information, both qualitative and quantitative, to analyse learning needs, implement effective delivery and measure outcomes and impact. | ● |
| K17 | How to identify sources, trends and anomalies in data/information. | ● |
| K18 | How to shape internal information systems and how they play a role to support learning. | ○ |
| K19 | How technology can support learning, including understanding of digital platforms/delivery channels as relevant to the role. | ● |
| K20 | Emerging technologies that can support effective learning. | ● |

Key ● full map ○ partial map ✕ insufficient map

CIPD Associate Diploma in Organisational Learning and Development

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